



Enterprise Cloud Application Services – PEAK Matrix™ Assessment and Profiles Compendium

Cloud Vista
Market Report: November 2014 – Preview Deck

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CLOUD VISTA

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¹ Banking, financial services, and insurance

Table of contents (page 1 of 2)

Topic	Page no.
Introduction and overview	5
Section I: PEAK Matrix for enterprise cloud application services	12
Section II: Profiles of enterprise cloud application service providers	22
• Accenture	23
• Atos	26
• Capgemini	29
• CGI	32
• Cognizant	35
• CSC	38
• EPAM	41
• Fujitsu	44
• HCL Technologies	47
• HPES	50
• IBM	53
• IGATE	56
• Infosys	59
• L&T Infotech	62
• Mindtree	65
• Syntel	68
• Tech Mahindra	71
• Wipro	74
• Virtusa	77

Table of contents (page 2 of 2)

Topic	Page no.
Appendix	80
• Glossary of key terms	81
• Cloud Vista research calendar	82
• References	83

Background of the research (page 1 of 2)

Background of the research

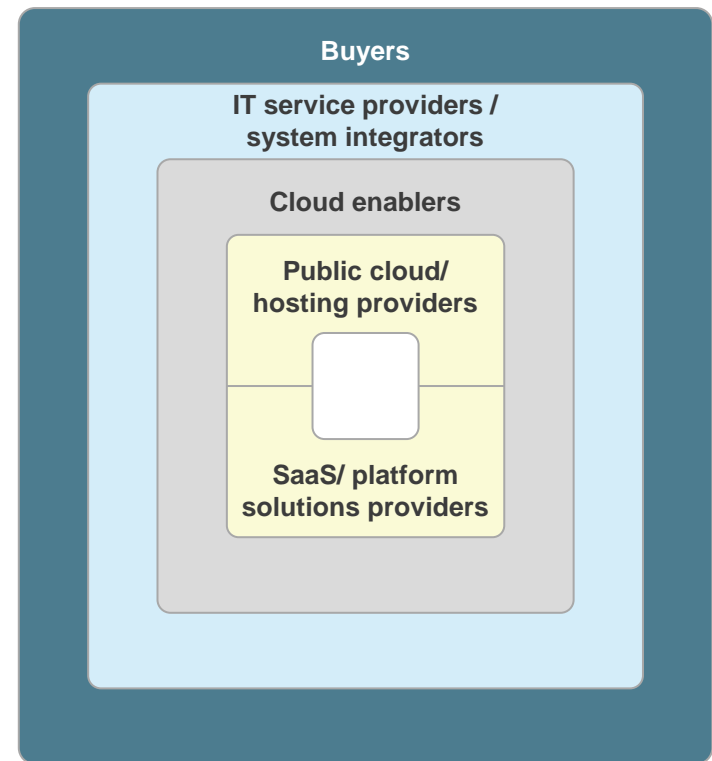
- Cloud adoption has become mainstream with enterprises looking to leverage cloud platforms and principles across the entire applications landscape. Cloud provides enterprises with an opportunity to gain access to, as well as manage applications with high levels of flexibility and scalability at reduced costs. Adoption of SaaS and cloud computing principles are also driving the need for applications consulting and migration services, as enterprises navigate the challenges associated with integrating new solutions with legacy systems and transforming/rationalizing the entire application landscape
- Service providers continue to ramp up their capabilities, build up scale, and invest 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 19 IT service providers featured on the cloud application services PEAK Matrix. Each service provider profile provides a comprehensive picture of its cloud service suite, scale of operations, domain investments, and key partnerships
- The assessment only covers IT service providers, who are involved in delivering cloud-based application 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

Background of the research (page 2 of 2)

Why this research is important

- Everest Group's analysis of the global cloud ecosystem reveals that system integrators form a critical part of the cloud vendor landscape.
- Cloud service providers / system integrators will continue to significantly influence the cloud market dynamics and, therefore, warrant an independent assessment
 - While core technology / infrastructure providers continue to form the backbone of the cloud ecosystem, it is the system integrators who bring the technology from cloud solution owners and enablers closer to the buyer community.
 - System integrators, through their design and consulting services, ensure that the cloud integration and deployment is more seamless and customized to the specific requirements of the clients
 - The role and competence of system integrators becomes even more relevant in the case of global enterprises, which involves multiple complex environments to be managed
- In terms of the services landscape, the scope of this report specifically covers cloud application services
 - There is an increasing focus of system integrators towards extending services that cut across cloud application services stack (i.e. consult, build, deploy, and manage)
 - Further, mature buyers are increasingly showing a propensity towards cloud-enabling their entire application landscape, rather than just specific applications components

Cloud Ecosystem



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

1

- Everest Group's annual RFI process with leading cloud IT 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

2

- 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

 **accenture**
High performance. Delivered.

 **Atos**

 **Capgemini**
CONSULTING. TECHNOLOGY. OUTSOURCING

 **CGI**

 **Cognizant**

 **CSC**

 **<epam>**

 **FUJITSU**

 **HCL**

 **hp**

 **IBM**

 **IGATE**
Speed. Agility. Imagination

 **Infosys**

 **L&T Infotech**

 **Mindtree**

 **SYNTEL**
Consider IT Done

 **Tech Mahindra**

 **virtusa**
Accelerating Business Outcomes

 **WIPRO**
Applying Thought

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

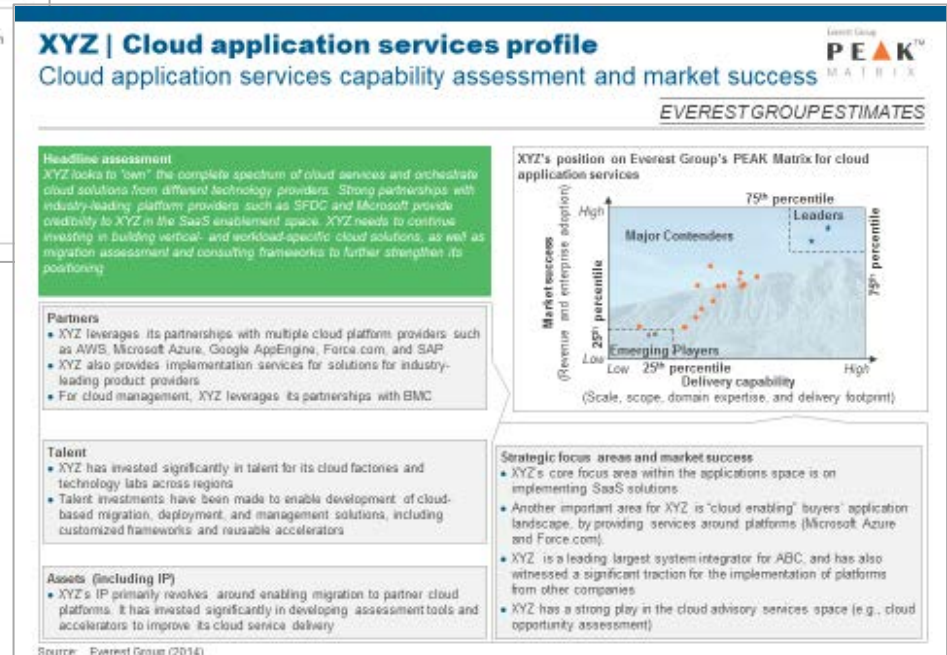
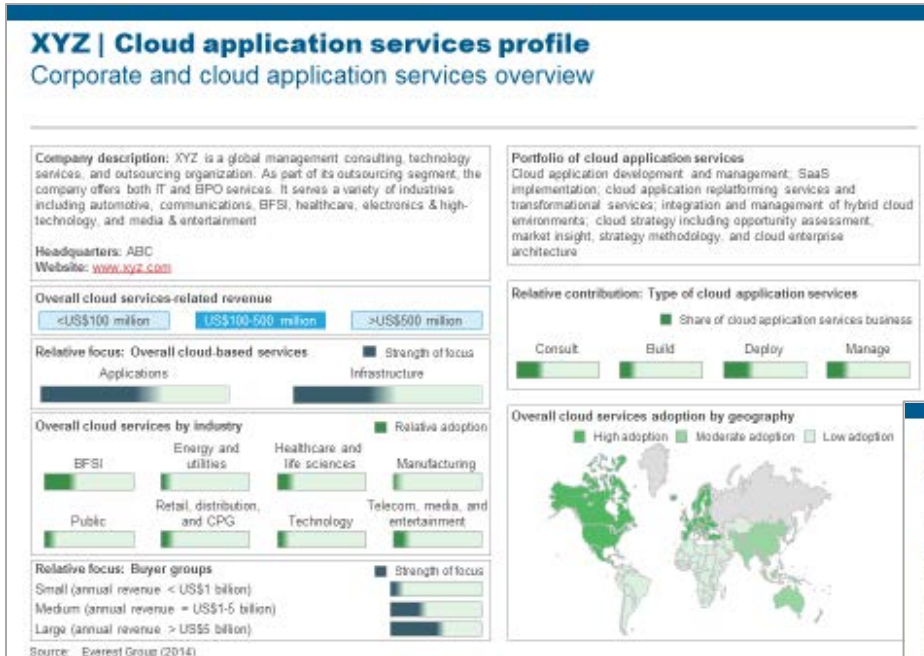
19 IT service providers were assessed and mapped on Everest Group's PEAK Matrix for cloud application services

This report provides the assessment and detailed profiles of the 19 IT service providers featured on Everest Group's cloud application services PEAK Matrix. The PEAK Matrix is specific to IT service providers, who are involved in delivering cloud-based applications services including development, migration, deployment, management, and advisory services

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

- **Leaders:** Accenture and IBM
- **Major Contenders:** Atos, Capgemini, CGI, Cognizant, CSC, Fujitsu, HCL Technologies, HPES, IGATE, Infosys, Mindtree, Syntel, Tech Mahindra, Wipro, and Virtusa
- **Emerging Players:** EPAM and L&T Infotech

This cloud service provider compendium report has 19 IT service provider profiles, focusing on their cloud application service suite, scale of operations, and domain investments



Source: Everest Group (2014)

Cloud Vista research calendar

Published
 Current

Topic **Release date**

Enterprise Cloud Review – Annual Snapshot 2013: The Year That Was!	February 2014
Enterprise Cloud Adoption – Cloud Deals Insights 2013	February 2014
Enterprise Cloud Quarterly Review: Q1 2014.....	May 2014
Enterprise Cloud Adoption Survey 2014: Summary of Results	May 2014
Cloud Becomes Strategic - Buyers Call for Help	July 2014
Enterprise Mobility - Move Beyond "Feel Good" RoI	July 2014
Enterprise Cloud Quarterly Review: Q2 2014.....	September 2014
Enterprise Cloud Application Services – PEAK Matrix Assessment and Profiles Compendium	November 2014
Enterprise Cloud Infrastructure Services – PEAK Matrix Assessment and Profiles Compendium	Q4 2014
Enterprise Cloud Quarterly Review: Q3 2014	Q4 2014
SaaS and the impact on IT consulting	Q4 2014
Enterprise Cloud Quarterly Review: Q4 2014	Q1 2015
Changing Asset Strategy of SPs	Q1 2015
Enterprise Cloud Quarterly Review: Q1 2014.....	Q2 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. Cloud Becomes Strategic – Buyers Call for Help:** ([EGR-2014-4-R-1146](#)); 2014. Cloud services continue to make significant strides in the enterprises. Buyers now leverage cloud services for mission-critical workloads. However, buyers aspire to move beyond typical cloud services value drivers of cost, flexibility, and agility. They want to evolve their cloud service ecosystem from an “IT opportunity” to a “strategic differentiator”. This report discusses this evolution and the skill-related challenges buyers witness, while fine-tuning their cloud strategy. This report also discusses the key success factors that the service providers should imbibe, to remain relevant
- 2. Enterprise Cloud Adoption – Cloud Deals Insights 2013:** ([EGR-2014-4-R-1062](#)); 2014. How have the cloud adoption trends changed over 2011-13? Which industries currently lead cloud adoption? Which geographies provide greater opportunities? What were the key cloud engagements and use-cases for cloud adoption in 2013? This research provides answers to these questions and more. Buyers will find the report useful to understand trends in the usage of cloud models within enterprises, and benchmark against relevant industries, peer sizes, geographies, etc. It will also be useful to cloud service providers to analyze their roles, drivers of cloud adoption, leading industries, and buyer types

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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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