



# Enterprise Cloud Infrastructure Services – PEAK Matrix™ Assessment and Profiles Compendium

Cloud Vista  
Market Report: November 2014 – Preview Deck

Everest Group  
**CLOUD** VISTA

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### Corporate Headquarters

Office: +1-214-451-3000

[info@everestgrp.com](mailto:info@everestgrp.com)

### European Headquarters

Office: +44-207-129-1318

[unitedkingdom@everestgrp.com](mailto:unitedkingdom@everestgrp.com)

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## 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

<sup>1</sup> Banking, financial services, and insurance

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## Background of the research

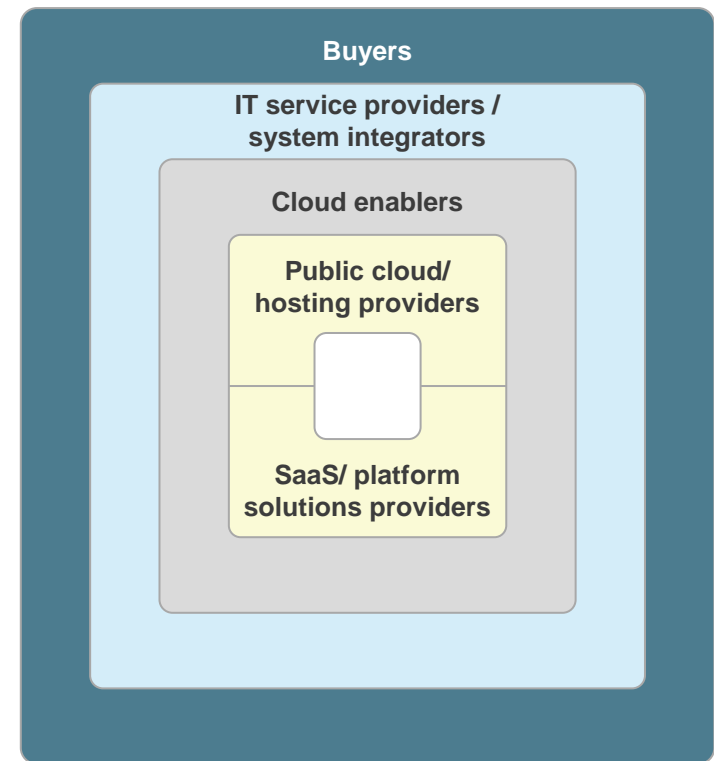
- The adoption of cloud computing has provided an alternative model for buyers across segments, to gain access to and consume enterprise-class infrastructure, with high levels of flexibility and scalability at reduced costs. Cloud adoption continues to grow, with enterprises increasingly demanding cloud delivery as part of their IT infrastructure deals, especially during engagement renewals or while commencing transformation initiatives
- 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 the 20 IT service providers featured on the cloud infrastructure services PEAK Matrix. 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 infrastructure 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 infrastructure services
  - There is an increasing focus of system integrators towards extending services that cut across cloud infrastructure services stack (i.e. consult, build, host, and manage)
  - Further, mature buyers are increasingly showing a propensity towards cloud-enabling large IT stacks, rather than just specific infrastructure 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 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



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

# 20 IT service providers were assessed and mapped on Everest Group's PEAK Matrix for cloud infrastructure services

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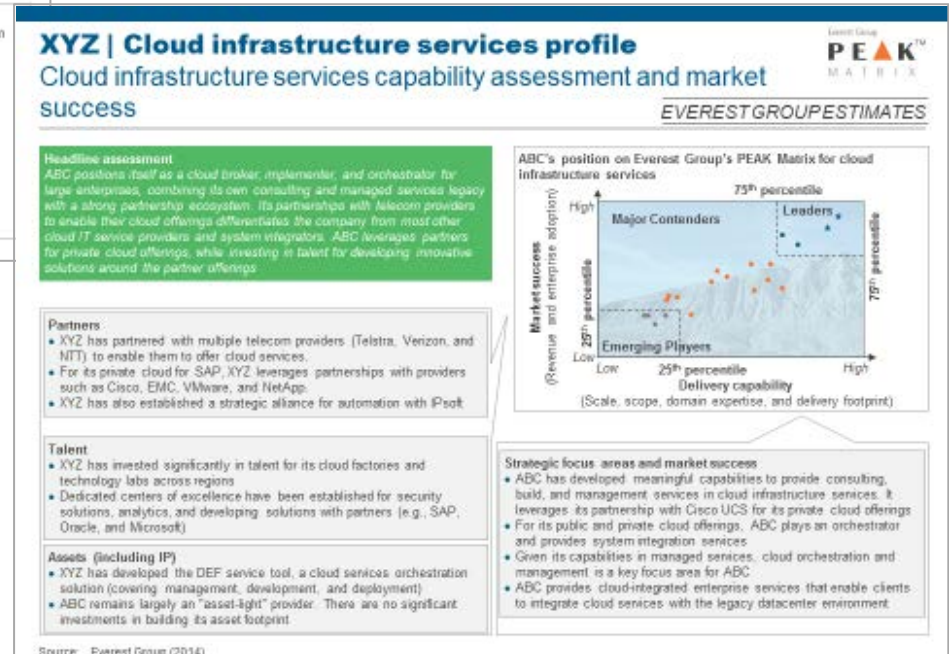
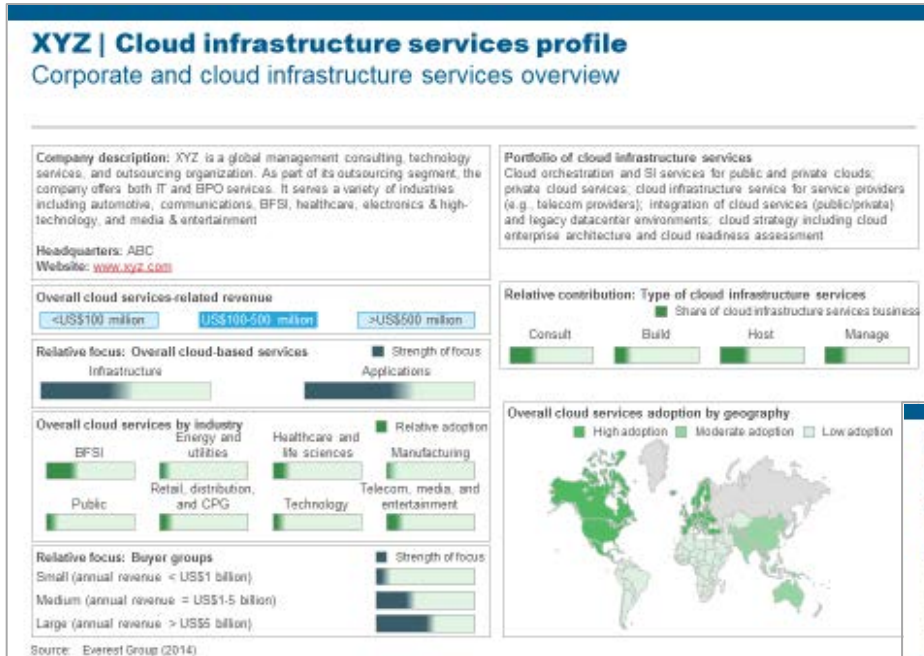
This report provides the assessment and detailed profiles of the 20 IT service providers featured on Everest Group's cloud infrastructure services PEAK Matrix. The PEAK Matrix is specific to IT service providers, who are involved in delivering cloud-based infrastructure services including migration, deployment, hosting, management, and advisory services

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

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



# This cloud service provider compendium report has 20 IT service provider profiles, focusing on their cloud infrastructure service suite, scale of operations, and domain investments



Source: Everest Group (2013)

# 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 Infrastructure Services – PEAK Matrix Assessment and Profiles Compendium .....	November 2014
Enterprise Cloud Application 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

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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

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

**Jimit Arora**, Vice President:

[jimit.arora@everestgrp.com](mailto:jimit.arora@everestgrp.com)

**Chirajeet Sengupta**, Vice President:

[chirajeet.sengupta@everestgrp.com](mailto:chirajeet.sengupta@everestgrp.com)

**Yugal Joshi**, Practice Director:

[yugal.joshi@everestgrp.com](mailto:yugal.joshi@everestgrp.com)

**Ashwin Venkatesan**, Senior Analyst:

[ashwin.venkatesan@everestgrp.com](mailto:ashwin.venkatesan@everestgrp.com)

Website: [www.everestgrp.com](http://www.everestgrp.com) | Phone: +1-214-451-3000 | Email: [info@everestgrp.com](mailto:info@everestgrp.com)



### 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

### 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



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