Cloud Services PEAK Matrix™ Assessment and Compendium 2020

Cloud & Infrastructure Services (CIS)
Market Report – December 2019: Complimentary Abstract / Table of Contents

Everest Group®

PEAK MATRIX™

Our research offerings for global services

► **Market Vista™**
Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available

► Application Services	► Human Resources
► BPS | Banking & Financial Services	► ITS | Banking & Financial Services
► BPS | Healthcare & Life Sciences	► ITS | Healthcare
► BPS | Insurance	► ITS | Insurance
► Catalyst™	► IT Services Executive Insights™
► **Cloud & Infrastructure**	► ITS | Life Sciences
► Customer Experience Management Services	► Locations Insider™
► Data & Analytics	► PricePoint™
► Digital Services	► Procurement
► Engineering Services	► Recruitment & Talent Acquisition
► Enterprise Platform Services	► Service Optimization Technologies
► Finance & Accounting	

Membership information

- This report is included in the following research program(s)
  - Cloud & Infrastructure Services (CIS)
- If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com, unitedkingdom@everestgrp.com, or india@everestgrp.com

More about membership

In addition to a suite of published research, a membership may include

- Accelerators™
- Analyst access
- Data cuts
- Pinnacle Model™ reports
- PriceBook
- Virtual Roundtables
- Workshops

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

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RESEARCH

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Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

- Market thought leadership
- Actionable and insightful research
- Syndicated and custom research deliverables

1 Robust definitions and frameworks
(PEAK Matrix™, market maturity, and technology adoption/investment)
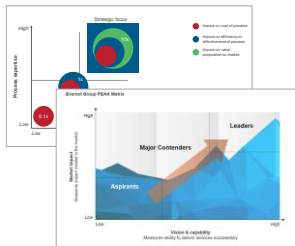

2 Primary sources of information
Annual contractual and operational RFIs, service provider briefings and buyer interviews, web-based surveys
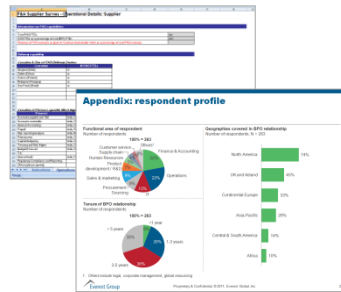
3 Diverse set of market touchpoints
Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership
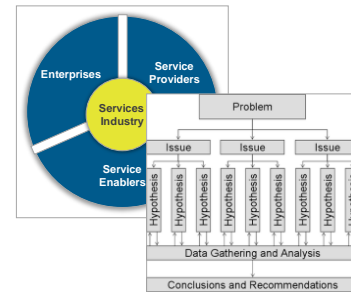
4 Fact-based research
Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and service providers
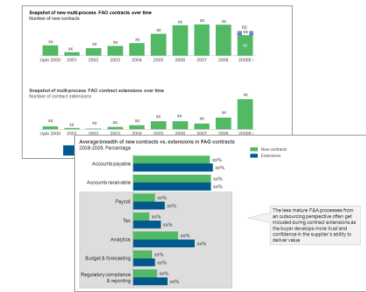
- Annual RFI process and interaction with leading IT infrastructure and cloud service providers
- Dedicated team for IT infrastructure and cloud services adoption trends
- Over 25 years of experience in advising clients on global services decisions
- Executive-level relationships with buyers, service providers, technology providers, and industry associations

This report is based on four key sources of proprietary information

- Proprietary database of IT services contracts of major IT service providers with workplace services in the 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, Total Contract Value (TCV) & Annual Contract Value (ACV) service provider Full-time Equivalents (FTEs), start and end dates, duration, and delivery locations
  - Scope details including share of individual buyer locations being served in each contract, Lines of Businesses (LOBs) served, and the pricing model employed
- 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 LOBs
  - Revenue split by region
  - Location and size of delivery centers
  - Technology solutions developed

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

- **Buyer reference interviews, ongoing buyer surveys, and interactions**
  - Drivers and challenges for adopting workplace services
  - Assessment of service provider performance
  - Emerging priorities
  - Lessons learnt and best practices adopted

Service providers assessed[1]

accenture Atos Capgemini Cognizant

CSS CORP DXC.technology ensono FUJITSU

GAVS happiest minds The Mindful IT Company HCL HEXAWARE

IBM Infosys MICROLAND Extraordinary. Everyday. Mphasis Unleash the Next

NIIT technologies NTT DaTa TATA CONSULTANCY SERVICES Tech Mahindra

UST Global virtusa wipro YASH Technologies More than what you think. ZenSar TECHNOLOGIES Your Transformation Partner

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1   Assessment for Fujitsu and IBM excludes service provider input in this particular study and is based on Everest Group's estimates that leverage Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and interaction with buyers
    The source of all content is Everest Group unless otherwise specified

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

Background of the research

Enterprises are increasingly leveraging cloud services in their pursuit of the digital businesses model as they seek to align cloud value proposition with business goals. Early adopters were seeking efficiency, but as the cloud services matured, the adoption of the cloud are driven by digital business needs such as faster time to value, better quality to satisfy the customers, more flexibility to react to an uncertain market, and a high availability of critical systems. Proliferation of cloud offerings in the market, coupled with management complexities and talent crunch are pushing enterprises to seek third-party support. Service providers can help enterprises with their transformation agenda in an increasingly multi-cloud, hybrid, and open cloud market.

In this research, we present an assessment and detailed profiles of 25 IT service providers featured on the cloud services PEAK Matrix™. Each service provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP)/solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for the calendar year 2019, interactions with leading cloud services providers, client reference checks, and an ongoing analysis of the cloud services market.

Scope of this report

- **Services:** Cloud services
- **Geography:** Global
- **Service providers:** 25 leading cloud services providers

This report includes the profiles of 25 leading cloud service providers featured on the cloud services PEAK Matrix. They are as follows:

- **Leaders:** Accenture, Capgemini, Cognizant, HCL Technologies, IBM, TCS, and Wipro
- **Major Contenders:** Atos, CSS Corp, DXC Technology, Ensono, Fujitsu, Hexaware, Infosys, Microland, Mphasis, NTT DATA, Tech Mahindra, UST Global, and Virtusa
- **Aspirants:** GAVS Technologies, Happiest Minds, NIIT Technologies, YASH Technologies, and Zensar

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

Consulting services
- Cloud strategy formulation (business and technical)
- Cloud adoption roadmap formulation, cloud readiness assessment and benchmarking, and cloud TCO analysis

Cloud infrastructure design/build services
Design, architecture, and build of ground-up cloud infrastructure/platform (public, hybrid, private cloud, SDI)

Cloud modernization services
App/data migration (lift and shift), platform modernization, refactoring, rearchitecting, cloud native app development/testing, cloud-based DevOps, and API integration

Third-party SaaS implementation
Implementation services offered for third-party enterprise SaaS products (e.g., SAP, Oracle, Workday, Salesforce, Adobe, third party industry clouds, and other third-party SaaS offerings)

Private cloud hosting
SI-owned private cloud hosting and hosted as-a-service offerings (DR, storage, private PaaS, and IaaS)

Cloud operate services
Cloud operations (cloud asset management, lights on / helpdesk, service assurance, etc.), cloud application management, cloud orchestration, optimization, billing, etc.

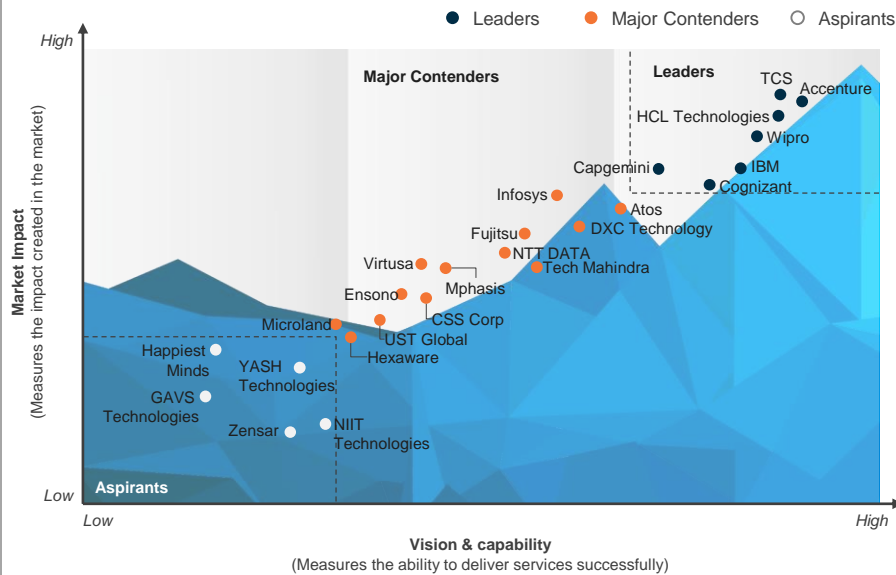**Internal cloud platforms and products**
System integrator-owned, industry- / function-specific, cloud solutions (SaaS / BPaaS / industry platform solutions)

Cloud security services
Cloud security strategy, assessment and audit, cloud security design and implementation, Cloud Access Security Brokerage (CASB) enablement, cloud governance and monitoring, managed services for cloud security, and container security for cloud workloads

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This study offers a deep dive into key aspects of cloud services market

Everest Group Cloud Services PEAK Matrix™ Assessment 2020

● Leaders   ● Major Contenders   ○ Aspirants

High — Market Impact (Measures the impact created in the market)

Leaders: TCS, Accenture, HCL Technologies, Wipro, IBM, Cognizant, Capgemini

Major Contenders: Infosys, Atos, DXC Technology, Fujitsu, NTT DATA, Tech Mahindra, Virtusa, Mphasis, Ensono, CSS Corp, Microland, UST Global, Hexaware

Aspirants: Happiest Minds, YASH Technologies, GAVS Technologies, Zensar, NIIT Technologies

Vision & capability (Measures the ability to deliver services successfully)

Note: Assessments for Fujitsu and IBM; excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers

Capability assessment
Illustrative example

Measure of capability: ● High   ◔ Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall
Service provider 1									
Service provider 2									
Service provider 3									
Service provider 4									
Service provider 5									
Service provider 6									
Service provider 7									
Service provider 8									
Service provider 9									

Everest Group's remarks on service providers
Illustrative example

Measure of capability: ● High   ◔ Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall

Strengths
- Service provider has a strong focus on building end-to-end cloud service capabilities and making investments aimed at building its partner network and maturing its capabilities across themes such as intelligent automation and DevOps
- Clients have appreciated its flexibility in terms of providing specific solutions as per enterprise requirement

Areas of improvement
- While service provider is taking steps to mature its cloud services portfolio, it needs to significantly enhance its consulting capabilities to position itself as a transformation partner for enterprises
- Proof points around building and executing on large-scale transformation roadmaps are still limited in number

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This report has 25 IT service provider profiles, focusing on their cloud services vision and strategy, scope of services, innovation and investments, and delivery footprint

Research calendar – Cloud and Infrastructure Services

Flagship CIS reports	Release date
Digital Workplace Services PEAK Matrix™ Assessment 2019: Enterprises, It is Time to Humanize the Workplace Experience	June 2019
Next-generation Infrastructure Services for Insurance PEAK Matrix™ Assessment 2019 and Market Trends	June 2019
Next-generation Infrastructure Services for BFS – PEAK Matrix™ Assessment 2019 and Market Trends	June 2019
DevOps Enablement Services PEAK Matrix™ Assessment 2019 and Market Trends	July 2019
Top 20 Digital Workplace Trailblazers: Creating Connected Experiences for Digital-savvy Enterprises	October 2019
Exploring the Enterprise Journey Towards "Invisible" IT Infrastructure	October 2019
Top 10 SD-WAN Trailblazers: The Missing "Link" in the Enterprise Digital Transformation Story	November 2019
Cloud Services PEAK Matrix™ Assessment and Compendium 2020	**December 2019**
Next-generation Network Transformation Services PEAK Matrix™ Assessment 2020 and Market Trends	Q4 2019

Thematic CIS reports	
Upcoming Contract Renewals – Infrastructure Services	January 2019
Enterprise Pulse Report: The Dissatisfaction Conundrum	January 2019
Viewpoint – Edge Computing	February 2019
Security Operations for the Digital World	Q1 2020
Tech Bytes – Debunking Containers Myth	Q1 2020

Note: For a list of all of our published CIS reports, please refer to our website page

Additional ITS research references

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

1. **Cloud and Infrastructure Services – Annual Report 2019: Exploring the Enterprise Journey Towards "Invisible" IT Infrastructure** (EGR-2019-29-R-3406). This report explores enterprises' shift toward invisible infrastructure, which is agile and adapts to changing business needs (intelligent), delivers seamlessly across stacks through open architectures (interoperable), and protects the business (invincible).The report also provides insights on the overall IS landscape, including buyer analysis across industries, geographies, and revenue segments; the global IT services market size; and its distribution by service type, geography, and industry.

2. **Top 10 SD-WAN Trailblazers: The Missing "Link" in Enterprise Digital Transformation Story** (EGR-2019-29-R-3410). Traditional WAN architecture is suboptimal to meet the demands of enterprise digital transformation initiatives. Software Defined Wide Area Network (SD-WAN) is emerging as a key transformation lever to address these challenges. Multiple startups have emerged to serve this space and drive innovation across network segments through next-generation concepts. This report provides market trends in SD-WAN along with the detailed profiles and assessment of 10 SD-WAN startups providing services and solutions such as edge SD-WAN appliances, multi-cloud connectivity, enhanced application performance, branch platforms, optimized bandwidth usage, cloud security, and managed SD-WAN.

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

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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 empower 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.

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