Cloud Services PEAK Matrix® Assessment 2022 – North America

December 2021: Complimentary Abstract / Table of Contents

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Locations: costs, skills, sustainability, portfolios

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Background of the research

The COVID-19 pandemic has accelerated the pace of digital transformation and increased the adoption of cloud among enterprises. Enterprises are no longer looking at cloud just from a cost saving perspective but are considering it as an area of investment that drives value for their businesses. Clients expect services beyond cloud with the aspects of customer experience-centric design, business-led transformation, and code-based infrastructure embedded in the overall transformation play.

Hybrid and multi-cloud environments are being preferred by enterprises for complex workloads supported by agile and DevOps-based delivery. Service providers are adopting a platform-based approach instead of a service-based approach to design offerings and are approaching clients with an industry-specific cloud solutions portfolio. Enterprises are looking for partners to aid them in their end-to-end cloud adoption journey across cloud consulting, infrastructure design/build, modernization, private cloud hosting, cloud operations, and cloud security services.

In this research, we present an assessment and detailed profiles of 29 IT service providers for their cloud services capabilities in North America region featured on **Cloud Services PEAK Matrix® Assessment 2022 – North America**. The assessment is based on Everest Group's annual RFI process for calendar year 2021, interactions with leading cloud services providers, client reference checks, and an ongoing analysis of the cloud services market.

This report includes the profiles of the following 29 leading cloud service providers featured on the cloud services PEAK Matrix – North America:

- **Leaders:** Accenture, Capgemini, Deloitte, DXC Technology, HCL Technologies, IBM, Infosys, TCS, and Wipro
- **Major Contenders:** Atos, Brillio, Coforge, Cognizant, CSS Corp, Ensono, Genpact, LTI, Microland, Mindtree, Mphasis, NTT DATA, Tech Mahindra, Unisys, and Virtusa
- **Aspirants:** Cloudreach, GFT, Jade Global, UST, and Zensar

Scope of this report:

Geography
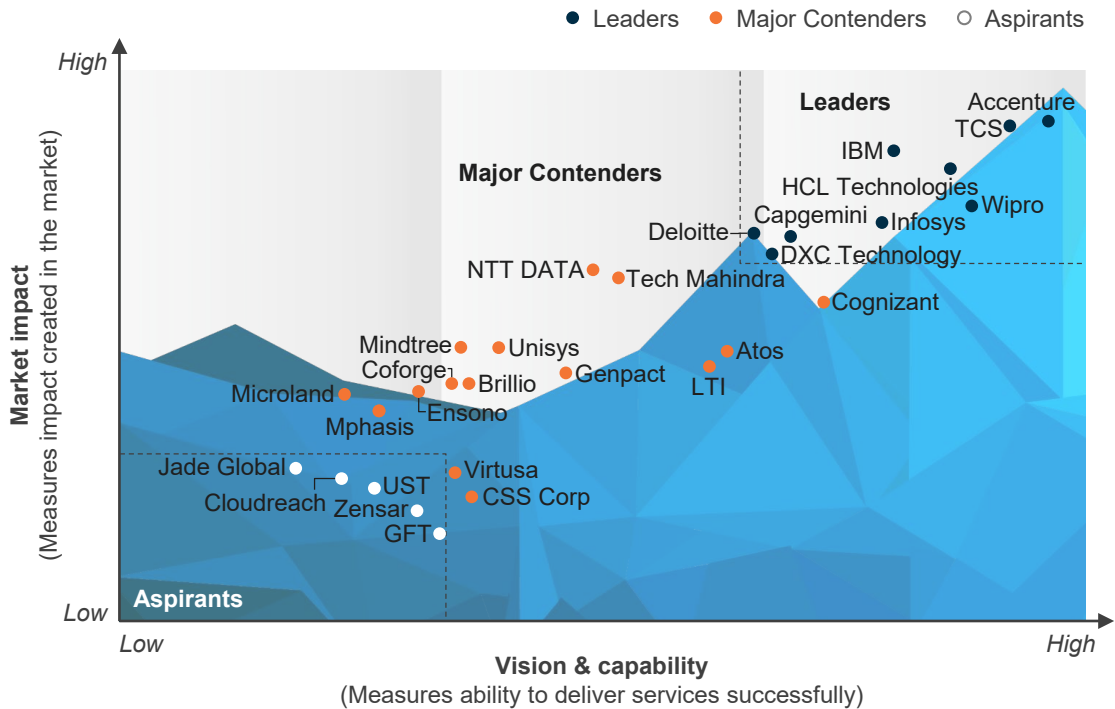North America

Service providers
29

Services
Cloud Services

This study offers three distinct chapters providing a deep dive into key aspects of Cloud services market; below are three charts to illustrate the depth of the report

Cloud Services PEAK Matrix® Assessment 2022 – North America[1]

Illustrative example

● Leaders   ● Major Contenders   ○ Aspirants

Market impact (Measures impact created in the market)

High

Leaders

Accenture
TCS
IBM
HCL Technologies
Capgemini   Wipro
Deloitte   Infosys
DXC Technology
NTT DATA   Tech Mahindra
Cognizant

Major Contenders

Mindtree
Coforge   Unisys
Brillio   Genpact
Microland   Atos
Ensono   LTI
Mphasis

Jade Global
Cloudreach   UST   Virtusa
Zensar   CSS Corp
GFT

Aspirants

Low

Low   High

Vision & capability
(Measures ability to deliver services successfully)

Capability assessment

Illustrative example

Measure of capability: ◔ Low ● High

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	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: ◔ Low ● High

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

Strengths

- Service provider 1 has a balanced vision for cloud, and offers mature use cases for cloud security, modernization, and enhancements backed by an extensive portfolio of accelerators
- Clients have appreciated provider's competitiveness in pricing cloud solutions and the technical expertise demonstrated by its resources

Limitations

- A few clients have expressed that it should be more proactive with private cloud hosting activities that could help reduce their costs and improve Returns on Investment(RoI)
- Enterprise clients have highlighted a lack of industrialization in its cloud solutions portfolio

1   Assessment for Atos and Deloitte 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 insurance buyers.

Source: Everest Group (2021).

Research calendar
Cloud and Infrastructure Services

<table>
<tr><td></td><td>■ Published</td><td>■ Planned</td><td>■ Current release</td></tr>
</table>

Flagship reports	Release date
IT Managed Security Services (MSS) PEAK Matrix® Assessment 2021	June 2021
State of the Market: IT Infrastructure Automation Services	June 2021
Network Transformation and Managed Services PEAK Matrix® Assessment 2021	July 2021
Software-defined Wide Area Network (SD-WAN) Services PEAK Matrix® Assessment 2021	September 2021
Mainframe Services PEAK Matrix® Assessment 2022	November 2021
State of the Market: IT Infrastructure Services	December 2021
Cloud Services PEAK Matrix® Assessment 2022 – North America	**December 2021**
Cloud Services PEAK Matrix® Assessment 2022 – Europe	Q4 2021

Thematic reports	Release date
Future-proofing Enterprise Transformation with Cloud-agnostic Managed Services	February 2021
Upcoming Contract Renewals – Infrastructure Services 2021	March 2021
Enterprise Pulse Report: From Dissatisfaction to Delight: Sustaining Client Satisfaction in a Post-pandemic World	March 2021
Tech Bytes for Business Leaders: Containers	August 2021
Tech Bytes for Business Leaders: Workplace-as-a-Service (WaaS)	August 2021

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