Cloud Services Provider Compendium 2022 – North America

January 2022: Complimentary Abstract / Table of Contents

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- Life Sciences Information Technology
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- Market Vista™
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- Network Services and 5G
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- Procurement
- Recruitment
- Retirements Technologies
- Rewards and Recognition
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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 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.

Enterprises prefer hybrid and multi-cloud environments for complex workloads supported by agile and DevOps-based delivery. Service providers are adopting platform-based instead of service-based approach to design offerings and are approaching clients with industry-specific cloud solution portfolio. Enterprises are looking for partners to aid them in 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 detailed profiles of 29 IT service providers for their cloud services capabilities in the 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 report provides an insight into cloud services

Cloud services – market definition

Consulting services

- Strategy formulation (business and technical); TCO analysis
- Cloud adoption roadmap formulation, cloud readiness assessment, application assessment, and benchmarking
- Hybrid / multi-cloud feasibility assessment and adoption roadmap formulation

Infrastructure design/build services

- Design, implementation, and build of ground-up cloud infrastructure/platform for public cloud, private cloud, and edge cloud
- Design and implementation of hybrid cloud and multi-cloud

Cloud modernization services

- Application/workload migration (lift and shift) to cloud and between clouds (competitive migration)
- App/data platform modernization, application refactoring, application rearchitecting, and decommissioning
- Cloud-native and container-native application development

Private cloud hosting

SI-owned private/colocation cloud hosting and hosted as-a-service offerings (disaster recovery, storage, private Platform-as-a-Service (PaaS), and Infrastructure-as-a-Service (IaaS))

Infrastructure design/build services

- L1, L2, L3, and L4 support, operations, monitoring, capacity planning, and configuration support for cloud and container workloads
- Cloud orchestration, automation, optimization, and billing
- Next-generation IT operations: FinOps, AIOps, DevSecOps, etc.
- Excluding higher than L1 application management services

Cloud security

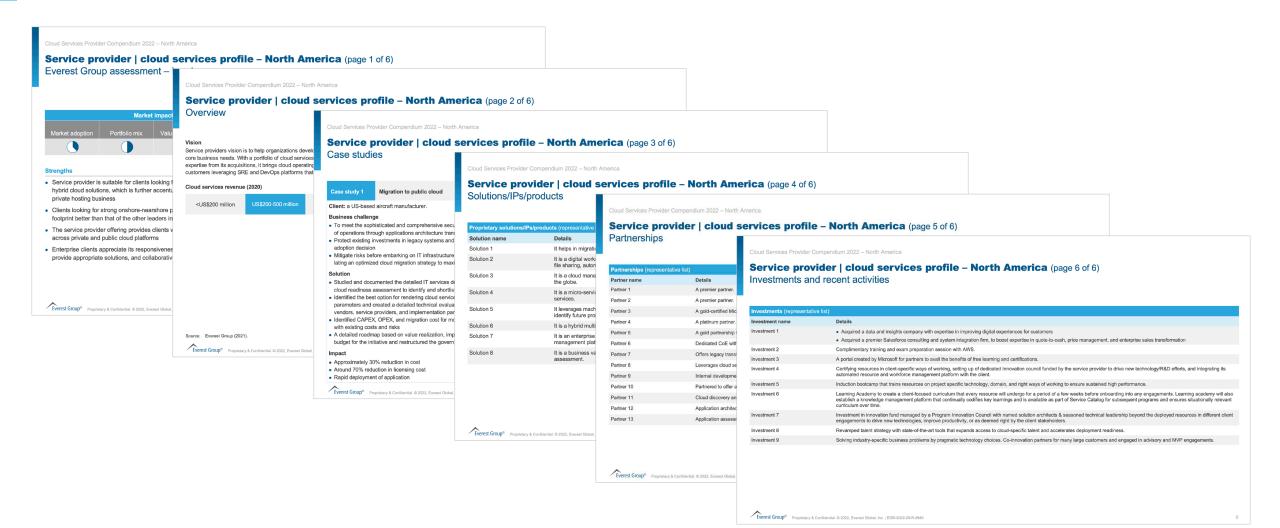- Cloud security consulting, vulnerability assessment, and auditing
- Cloud security design and implementation
- Cloud security managed services, incident management/response, cloud governance & monitoring, and container security for cloud workloads

The report includes detailed profiles of 29 cloud services providers

Cloud Services Provider Compendium 2022 – North America

Service provider | cloud services profile – North America (page 1 of 6)
Everest Group assessment –

| Market impact |
| Market adoption | Portfolio mix | Value |

Strengths
- Service provider is suitable for clients looking for hybrid cloud solutions, which is further accentuated private hosting business
- Clients looking for strong onshore-nearshore footprint better than that of the other leaders in
- The service provider offering provides clients across private and public cloud platforms
- Enterprise clients appreciate its responsiveness provide appropriate solutions, and collaborative

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Service provider | cloud services profile – North America (page 2 of 6)
Overview

Vision
Service providers vision is to help organizations develop core business needs. With a portfolio of cloud services expertise from its acquisitions, it brings cloud operating customers leveraging SRE and DevOps platforms that

Cloud services revenue (2020)

| <US$200 million | US$200-500 million |

Cloud Services Provider Compendium 2022 – North America

Service provider | cloud services profile – North America (page 3 of 6)
Case studies

| Case study 1 | Migration to public cloud |

Client: a US-based aircraft manufacturer.

Business challenge
- To meet the sophisticated and comprehensive secu of operations through applications architecture trans
- Protect existing investments in legacy systems and adoption decision
- Mitigate risks before embarking on IT infrastructure lating an optimized cloud migration strategy to maxi

Solution
- Studied and documented the detailed IT services cloud readiness assessment to identify and shortlist
- Identified the best option for rendering cloud servic parameters and created a detailed technical evalua vendors, service providers, and implementation par
- Identified CAPEX, OPEX, and migration cost for mo with existing costs and risks
- A detailed roadmap based on value realization, imp budget for the initiative and restructured the govern

Impact
- Approximately 30% reduction in cost
- Around 70% reduction in licensing cost
- Rapid deployment of application

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Service provider | cloud services profile – North America (page 4 of 6)
Solutions/IPs/products

Proprietary solutions/IPs/products (representative

Solution name	Details
Solution 1	It helps in migration
Solution 2	It is a digital work file sharing, auton
Solution 3	It is a cloud mana the globe.
Solution 4	It is a micro-servi services.
Solution 5	It leverages mach identify future pro
Solution 6	It is a hybrid multi
Solution 7	It is an enterprise management plat
Solution 8	It is a business va assessment.

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Partnerships

Partnerships (representative list)

Partner name	Details
Partner 1	A premier partner.
Partner 2	A premier partner.
Partner 3	A gold-certified Mic
Partner 4	A platinum partner.
Partner 5	A gold partnership
Partner 6	Dedicated CoE with
Partner 7	Offers legacy trans
Partner 8	Leverages cloud se
Partner 9	Internal developme
Partner 10	Partnered to offer a
Partner 11	Cloud discovery an
Partner 12	Application architect
Partner 13	Application assess

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Investments and recent activities

Investments (representative list)

Investment name	Details
Investment 1	• Acquired a data and insights company with expertise in improving digital experiences for customers • Acquired a premier Salesforce consulting and system integration firm, to boost expertise in quote-to-cash, price management, and enterprise sales transformation
Investment 2	Complimentary training and exam preparation session with AWS.
Investment 3	A portal created by Microsoft for partners to avail the benefits of free learning and certifications.
Investment 4	Certifying resources in client-specific ways of working, setting up of dedicated innovation council funded by the service provider to drive new technology/R&D efforts, and integrating its automated resource and workforce management platform with the client.
Investment 5	Induction bootcamp that trains resources on project specific technology, domain, and right ways of working to ensure sustained high performance.
Investment 6	Learning Academy to create a client-focused curriculum that every resource will undergo for a period of a few weeks before onboarding into any engagements. Learning academy will also establish a knowledge management platform that continually codifies key learnings and is available as part of Service Catalog for subsequent programs and ensures situationally relevant curriculum over time.
Investment 7	Investment in innovation fund managed by a Program Innovation Council with named solution architects & seasoned technical leadership beyond the deployed resources in different client engagements to drive new technologies, improve productivity, or as deemed right by the client stakeholders.
Investment 8	Revamped talent strategy with state-of-the-art tools that expands access to cloud-specific talent and accelerates deployment readiness.
Investment 9	Solving industry-specific business problems by pragmatic technology choices. Co-innovation partners for many large customers and engaged in advisory and MVP engagements.

Research calendar
Cloud and Infrastructure Services

| | Published | Planned | Current release |

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
Cloud Services PEAK Matrix® Assessment 2022 – North America	December 2021
Cloud Services PEAK Matrix® Assessment 2022 – Europe	December 2021
Cloud Services Provider Compendium 2022 – North America	**January 2022**
Cloud Services – Europe Service Provider Compendium 2022	Q1 2022
State of the Market: IT Infrastructure Services	Q1 2022
Mainframe Services Service Provider Compendium 2022	Q1 2022
State of the Market: Mainframe Services	Q1 2022

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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