

Multi-cloud Application Development Services Provider Compendium 2023

October 2022 : Complimentary Abstract / Table of Contents



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- ▶ Sustainability Technology and Services
- ▶ Talent Excellence GBS
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Introduction

Cloud adoption is on the rise with enterprises' perception toward the cloud evolving from being an enabler for cost savings to a driver for innovative business models and faster time-to-market. Further, the pandemic acted as a catalyst for this growth and led to the rise of new trends in cloud adoption, with multi-cloud being one of them.

Enterprises now have the flexibility to choose more than one cloud partner for deploying their applications and workloads, allowing them to leverage best-in-class services from each of these partners. As multi-cloud becomes the new norm, enterprises are looking for service providers who can act as holistic cloud transformation partners and avoid the complexities that arise from having multiple clouds in their landscape.

In this research, we present an assessment and detailed profiles of 15 multi-cloud application development service providers featured on the multi-cloud application development service PEAK Matrix®. Each 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 2022, interactions with leading multi-cloud application development service providers, client reference checks, and an ongoing analysis of the multi-cloud application development services market.

This report includes the profiles of the following 15 leading multi-cloud application development services providers featured on the PEAK Matrix:

- **Leaders:** Accenture, Cognizant, Infosys, and TCS
- **Major Contenders:** DXC Technology, HCL Technologies, Service Provider, Mindtree, Mphasis, Service Provider, Softtek, UST, and Virtusa
- **Aspirants:** DISYS and Zensar

Scope of this report



Geography
Global



Providers
13 leading multi-cloud
application development
service providers



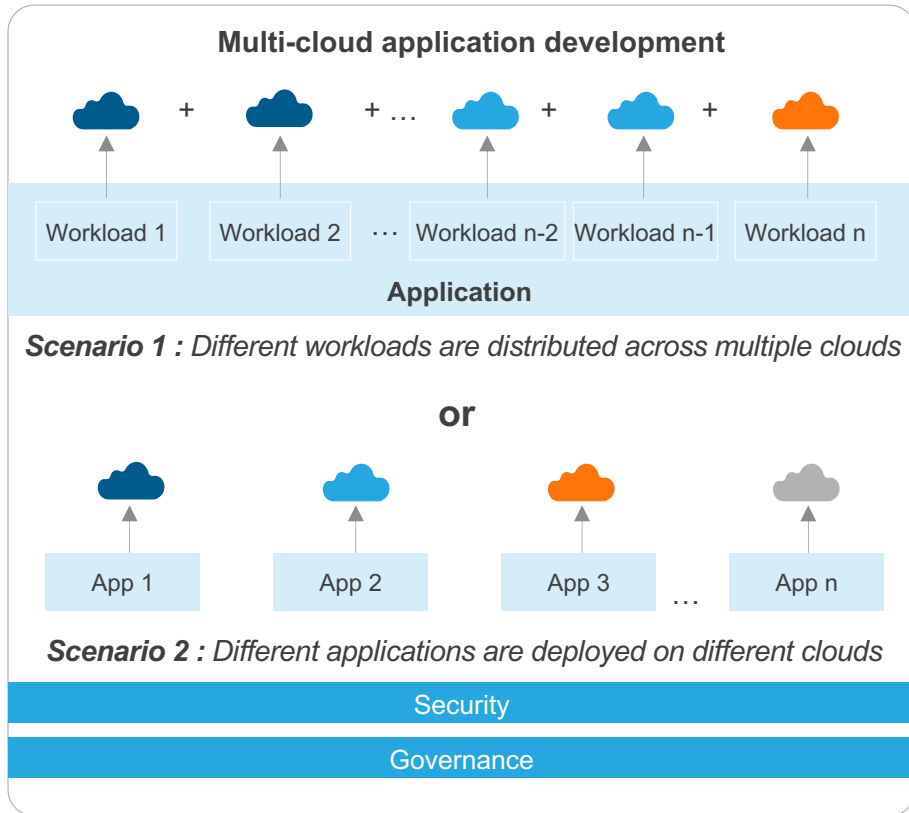
Services
Application development
and cloud services

Multi-cloud application development services scope

Definition

Multi-cloud application development is a strategy where enterprises adopt more than one cloud (public and/or private clouds) for deploying

- Scenario 1 (Multi-cloud application development): different workloads of application across different clouds to leverage the best-in-class capabilities of the cloud
- Scenario 2 (Multi-cloud enterprise strategy): different applications on different clouds



Focus of this study

Services

Advisory and consulting capabilities	Advisory capabilities for multi-cloud strategy formulation and roadmap creation				
Application development capabilities	Design	Test	Develop	Deploy	Build

Key application components

Components that can be deployed on cloud instances, enabling enterprises to adopt multi-cloud ILLUSTRATIVE

Hosting environments (including run time)	Database	Authentication and authorization
Disaster recovery / Data archival	Edge devices	Analytics & BI (SaaS components)

Exclusions

- Refactoring an existing application to remove technical debt or improve functionalities
- Management, maintenance, and support of applications

The report includes detailed profiles of 15 multi-cloud application development service providers

Multi-cloud Application Development Services Provider Compendium 2023

Provider | multi-cloud application development services profile (page 1 of 5) Everest Group assessment – Major Contender

Market impact		
Market adoption	Portfolio mix	Value delivery

Strengths

- Provider has strong credentials in various industries & spread across major verticals and markets
- Provider has a wide breadth of solutions covering all strategy to application development.
- Provider's focus to enable innovative commercial and around risk-sharing and flexibility helps strengthen its

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Provider | multi-cloud application development services profile (page 2 of 5) Overview

Vision

Provider's vision is based on its framework for a purposeful, business speed. It offers cloud development and consulting services with a focus on adoption for its clients. It aims to provide a comprehensive multi-cloud customers to adopt the right product mix of multi-cloud technology architectures, consumption models, cloud hosting zones, virtualization

Overview of services

Provider defines multi-cloud application development as the offerings strategize, implement, integrate, and orchestrate applications on their security, and backup/disaster recovery requirements. Its multi-cloud offerings include:

- Orchestrated multi-cloud application development & deployment services
 - Application workloads designed to be deployed and run on multi-cloud
 - Containerized multi-cloud deployments
 - Applications deployed across multiple cloud platforms leveraging multi-cloud
- Siloed multi-cloud application development & deployment scenario
 - Groups of applications deployed across cloud platforms, with multi-cloud
 - Applications deployed on edge systems

Multi-cloud application development services revenue

<US\$200 million	US\$200-500 million	US\$500 million+
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Multi-cloud Application Development Services Provider Compendium 2023

Provider | multi-cloud application development services profile (page 3 of 5) Offerings

Proprietary solutions for multi-cloud application development

Solution name	Details
Solution 1	Ready-to-use reference architecture, business service
Solution 2	This framework is a ready-to-use ready-to-use templates for log & analytics
Solution 3	This solution/service provides an unified business solution
Solution 4	This solution offers systems and integrations

Multi-cloud application development services partnerships (resellers)

Partner name	Details
Partner 1	As a premier consulting partner, achieve seven more in the next
Partner 2	As a strategic gold partner, provide ITES360 partners globally.
Partner 3	Provider is an authorized reseller
Partner 4	Provider is an SI and gold business XYZ offering. It leverages the sales

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Provider | multi-cloud application development services profile (page 4 of 5) Offerings

Multi-cloud application development services investments (partners)

Investment name	Details
Investment 1	Provider is investing in training agile ways of working, which will of the existing learning system
Investment 2	XYZ focuses on providing expert XYZ brings a strong team of cloud
Investment 3	XYZ brings a strong team of cloud

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Multi-cloud Application Development Services Provider Compendium 2023

Provider | multi-cloud application development services profile (page 5 of 5) Case studies

Case study 1 Multi-cloud implementation for a global pharma manufacturer

Client: a global generics pharma manufacturer

Business challenge

- The customer was looking to implement its customer-facing applications on AWS and business services and data on Azure, owing to an analytics infrastructure
- The transformation scope also included new enhanced features with an improved UI/UX design to provide a unified business solution
- The customer wanted to ensure compliance with GxP & non-GxP data environments

Solution

- Provider implemented XYZ, an innovative solution, to integrate multi-cloud sources, and process, stream, and make data available for consumption & analytics
- A holistic seven-layer modern design principle-led Azure architecture was created to meet all functional and technical (NFR) design aspects
- Provider implemented responsive web UI to support various screen resolutions and developed REST APIs using Django Rest Framework. Tools and modules for handling API requests, serialization, database connections, automatic admin UI generation, etc., were also provided
- Provider followed PaaS-based, highly scalable, and available architecture design; and used Azure DevOps features, repositories for version controlling of application source code, and pipelines for CI/CD purposes

Impact

- Cost consolidation by portfolio
- Eliminated bottleneck at private cloud for scaling for peak demands
- Achieved X% improvement in overall performance of major systems
- Redesigned Y% screens for better UX & templating
- Enabled XX faster DevSecOps adoption

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Case study 2 Customer-centric transformation through multi-cloud implementation

Client: the world's largest network and communications company

Business challenge

- The customer was looking to implement its customer experience platform on AWS and other workloads on GCP and ERP on Oracle Cloud
- It was suffering from rising technical debt of its existing data & analytics landscape due to legacy technology platforms and a high cost of on-premise landscape along with high management and support costs
- There was lack of support to the data science use cases, delaying the transition from being a product-centric to customer-centric organization

Solution

- As part of the solution, provider packaged and deployed application workloads as container images, and leveraged Arktos for Kubernetes federation
- Provider helped develop a modern customer experience platform with omnichannel, persona-centric experience for its end-users and partners
- Implemented cloud-native build for multi-cloud to achieve 99.99% availability, and take better advantage of cost and operational levers
- Provider helped in rationalization, consolidation, and simplification of legacy landscape to a future-ready foundational data platform in AWS cloud; snowflake was leveraged as the core data warehouse platform to develop new capabilities in the area of data science/analytics
- Defined a hub and spoke data and Extract Load and Transform (ELT) architecture to take advantage of native capabilities of snowflake to deliver best-in-class price/performance

Impact

- Achieved the customer's target to be vendor independent
- Fungibility of cloud service provider choice
- Pivot from legacy technology to cloud-native architecture and applications to leverage benefits of cost, scale, and innovation to achieve the vision of becoming a customer-centric organization

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Research calendar

Application Services

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Enterprise Quality Assurance (QA) – Service Provider Compendium 2022	January 2022
Low-code Workflow Automation Platforms Compendium 2022	January 2022
Low-code Application Development Platforms PEAK Matrix® Assessment 2022	March 2022
Integration Platform Trailblazers: Top 10 Start-ups Unifying Enterprise Applications	March 2022
The Post-pandemic IT Playbook	March 2022
Enterprise Pulse 2022: Solving the Talent Conundrum around Availability, Attrition, and Reskilling of the Workforce	June 2022
Decoding Transformation Success Factors: Battling the Talent Crunch with a Technology-first Strategy	July 2022
Webinar Deck: Low Code for Digital Transformation – Debunk the Myths and Explore the Possibilities	August 2022
Multi-cloud Application Development Services PEAK Matrix® Assessment 2022	September 2022
Multi-cloud Application Development – Service Provider Compendium 2023	October 2022
Application Services State of the Market 2023	Q4 2022
Sustainability in Software – Paving the Way for a Greener IT Landscape	Q4 2022
Multi-cloud Application Development State of the Market 2023	Q4 2022
Design and Prototyping Tools State of the Market 2023	Q4 2022
Automation Solutions PEAK Matrix® Assessment 2023	Q4 2022

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