

Cloud Services PEAK Matrix® Assessment 2023 – North America

July 2023: Complimentary Abstract / Table of Contents



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Background of the research

Cloud adoption has reached a stage of maturity where organizations are now leveraging cloud services for increasing operational efficiency, enabling business innovation, and accelerating organizational growth. However, existing economic headwinds have prompted enterprises to scrutinize their cloud modernization spend and intensify their focus on cloud operations. Hybrid and multi-cloud strategies are being adopted to enhance reliability and utilize the best-of-the-breed offerings across cloud providers. At the same time, industry-specific cloud offerings, AI-backed cloud solutions, cloud sustainability, and product-centric operations are gaining traction. In the North American market, organizations are prioritizing business value outcomes and value creation throughout their cloud adoption journey, encompassing cloud consulting, infrastructure design/build, modernization, private cloud hosting, cloud operations, and cloud security services. Service Providers (SPs) are focusing on strengthening their horizontal- and vertical-focused partnerships with technology and platform providers to aid enterprises in their cloud adoption engagements.

In this research, we present an assessment and detailed profiles of 32 cloud SPs featured on **Cloud Services PEAK Matrix® Assessment 2023 – North America**. The assessment is based on Everest Group’s annual RFI process for calendar year 2023, interactions with leading cloud SPs, client reference checks, and an ongoing analysis of the cloud services market.

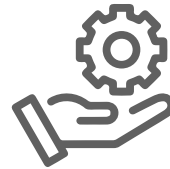
This report includes the profiles of the following 32 leading providers featured on the cloud services PEAK Matrix – North America:

- **Leaders:** Accenture, Capgemini, Deloitte, HCLTech, Infosys, TCS, and Wipro
- **Major Contenders:** Brillio, Cognizant, DXC Technology, EPAM, Genpact, GFT, Hitachi Vantara, IBM, Kyndryl, LTIMindtree, Microland, Mphasis, Movate, NTT DATA, PwC, Tech Mahindra, Unisys, UST, and Virtusa
- **Aspirants:** Aspire Systems, HTC Global Services, Jade Global, Marlabs, Sonata Software, and Stefanini

Scope of this report



Geography
North America



Providers
32 cloud SPs



Services
Cloud services

Overview and abbreviated summary of key messages

In this report, we present the assessment and detailed profiles of 32 SPs featured on the Cloud Services PEAK Matrix® Assessment 2023 – North America. The assessment is based on Everest Group’s annual RFI process for calendar year 2023, interactions with leading SPs, client reference checks, and an ongoing analysis of the cloud services market.

Some of the findings in this report, among others, are:

Everest Group Cloud Services PEAK Matrix® Assessment

This report includes the profiles of the following 32 leading SIs featured on the Cloud Services PEAK Matrix:

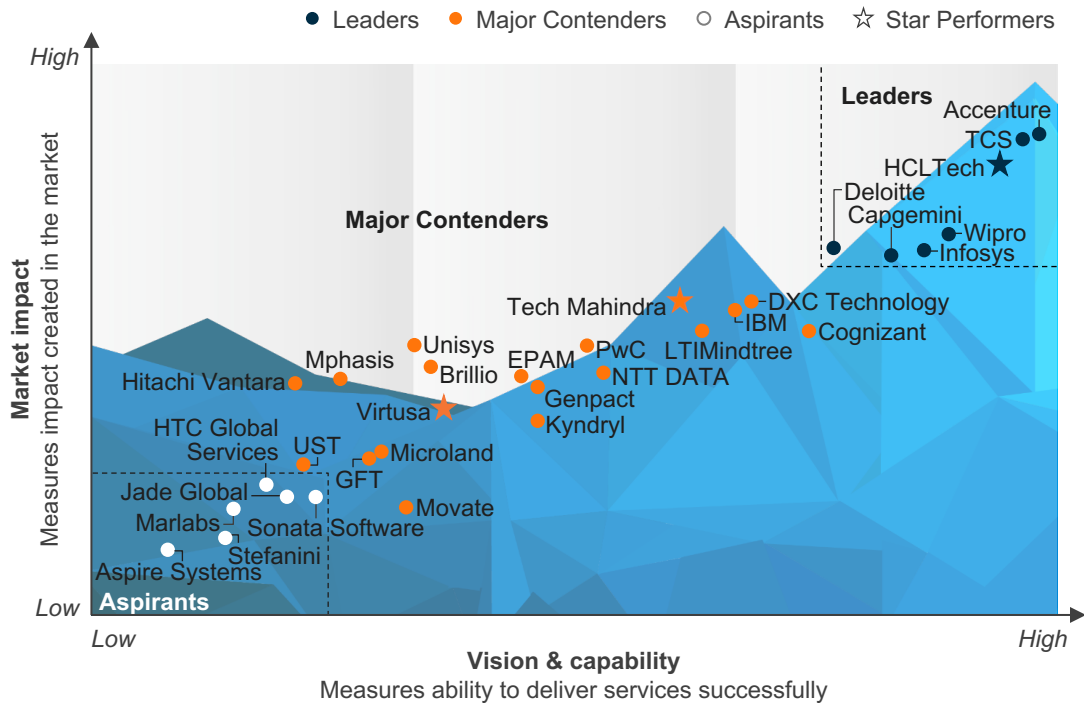
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- **Aspirants:** Aspire Systems, HTC Global Services, Jade Global, Marlabs, Sonata Software, and Stefanini

Service provider characteristics

- Leaders continue to showcase expertise in end-to-end integrated cloud transformation engagements with credible suite of IPs and solutions including industry-cloud solutions and AI-enabled offerings
- Major Contenders are augmenting their broader cloud capabilities with targeted investments in talent development, delivery capabilities, and partnership ecosystem; however, end-to-end integrated cloud transformation capabilities have some visible gaps
- Aspirants are approaching the market with a higher focus on certain segments of cloud services rather than a balanced portfolio, limited vertical focus, and restricted delivery footprint

This study offers 32 distinct chapters providing a deep dive into key aspects of cloud services market; below are three charts to illustrate the depth of the report

Everest Group Cloud services PEAK Matrix® Assessment 2023 – North America^{1,2,3}



1 Assessments for Cognizant, Deloitte, and IBM excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and Everest Group's interaction with buyers
 2 Analysis for LTIMindtree is based on capabilities after the merger of LTI and Mindtree
 3 Analysis for IBM is based on capabilities after the split into IBM and Kyndryl
 Source: Everest Group (2023)

Capability assessment

Illustrative example

Measure of capability: 🟡 Low ● High

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

Everest Group's remarks on 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

- Enterprises seeking an SP for cloud security coverage based on zero-trust principles with an integrated approach across data, app, and infrastructure, will benefit from provider's security platforms and their credible enterprise proof points
- Enterprises have appreciated provider for its process-oriented approach and client-centric delivery

Limitations

- Enterprises need to do a careful due diligence before opting for provider for large-scale consulting-focused engagements as its cloud consulting capabilities are less mature compared to peers
- Provider might not be the right fit for clientele seeking a cost-optimized offshore-based delivery model as it has a heavy onshore and nearshore delivery presence

Research calendar

Cloud and Infrastructure Services

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Cloud Services State of the Market: Maximizing Value from Cloud – North America	December 2022
Cloud Services State of the Market: Maximizing Value from Cloud – Europe	December 2022
Network Transformation Services PEAK Matrix® Assessment - Communication Services Providers (CSPs) 2023	December 2022
Network Transformation Services Provider Compendium – Communication Service Providers (CSPs) 2023	January 2023
Cloud Adoption in Banking: Imperative Role of Hyperscalers	July 2023
Navigating the Cloudscape: Unveiling Enterprise Adoption of Google Cloud Services	July 2023
Cloud Services PEAK Matrix® Assessment 2023 – North America	July 2023
Cloud Services PEAK Matrix® Assessment 2023 – Europe	Q3 2023
Cloud Services – Provider Compendium 2023 – North America	Q3 2023
Cloud Services – Provider Compendium 2023 – Europe	Q3 2023
Network Transformation and Managed Services PEAK Matrix® Assessment – System Integrators 2023	Q3 2023
AWS Services State of the Market 2023: Enabling Enterprise Transformation with AWS	Q3 2023
Microsoft Azure Services – State of the Market 2023	Q3 2023
FinOps: a Critical Element of Enabling Cloud for Value (CfV)	Q3 2023
Cloud Security Services PEAK Matrix® Assessment 2023	Q4 2023

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