

Cloud Services Provider Compendium 2023 – North America

October 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

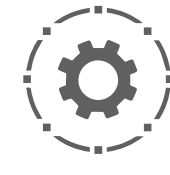
Scope of this report



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:

- **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

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

The Cloud Services PEAK Matrix® Assessment 2023 – North America report has over 32 provider profiles

Provider 1 profile (page 1 of 6)
Overview

Cloud services vision
Providers 1 offers a wide range of services such as AI, cloud business transformation, cloud infrastructure and strategic risk.

Overall cloud services revenue (2022)

<US\$200 million	US\$200-500 million
------------------	---------------------

Scope of coverage

Consulting services	Infrastructure
Private cloud hosting	Cloud managed services

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Provider 1 profile (page 2 of 6)
Case studies

Case study 1 Migrated the call center

Client: Enterprise 1

Business challenge
The client was trying to redefine how its digital customer experience to increase revenue, reduce costs, and improve business operations.

Solution

- Designed a modern, intuitive, and mobile-friendly digital experience
- Developed a scalable cloud-enabled platform
- Platform investments and footprint
- Created a unified data landscape to drive business decision-making

Impact

- Enabled boost in website traffic and engagement
- Enabled substantial increase in new applications
- Improved accessibility, accuracy, and completion rates

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Provider 1 profile (page 3 of 6)
Solutions

Proprietary solutions (IPs/frameworks/accelerators)

Solutions

- Solution 1
- Solution 2
- Solution 3

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Provider 1 profile (page 4 of 6)
Partnerships

Partnerships (representative list)

Partners

- Partner 1
- Partner 1
- Partner 1

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Provider 1 profile (page 5 of 6)
Investments and recent acquisitions

Investments (representative list)

Investments

- Investment 1
- Investment 2

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Provider 1 profile (page 6 of 6)
Everest Group assessment – Leader

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 looking for consulting-focused engagements will benefit from provider's consulting-led cloud business transformation services and related solutions
- Those looking for mature cloud-enabled uses cases, such as AI/ML, edge, blockchain on cloud, and IoT, will benefit from provider's dedicated investments, thought leadership, and strong proof points in these areas
- Enterprises looking to engage with an SP for cloud security coverage can benefit from provider's integrated cloud security services and DevSecOps platform
- Clients have highlighted that provider 1 adopts a flexible approach, has cost competitive services, and takes full ownership of services delivery

Limitations

- Enterprises looking for private cloud services might not find provider suitable due to its limited investments and partnerships in this space
- Those looking for large-scale, cloud-managed, services-based engagements need to do careful due diligence as it trails some of its peers in terms of capability maturity and market mindshare
- Those beyond hi-tech and retail industries looking for mature industry-specific cloud solutions should carefully assess provider's capabilities as it lags peers in co-innovation initiatives and strong vertical partnerships
- Enterprises with complex workload transformation objectives, such as mainframe modernization and SAP transformation on cloud, might find its capabilities lagging peers

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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
Navigating the Cloudscape: Unveiling Enterprise Adoption of Google Cloud Services	July 2023
Network Transformation and Managed Services PEAK Matrix® Assessment – System Integrators 2023	August 2023
AWS Services State of the Market 2023: Enabling Enterprise Transformation with AWS	August 2023
Microsoft Azure Services State of the Market 2023: Catalyzing Enterprise Transformation with Azure Cloud Services	September 2023
Cloud Services PEAK Matrix® Assessment 2023 – Europe	September 2023
Cloud Services Provider Compendium 2023 – North America	October 2023
Cloud Services – Provider Compendium 2023 – Europe	Q4 2023
FinOps: a Critical Element of Enabling Cloud for Value (CfV)	Q4 2023

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