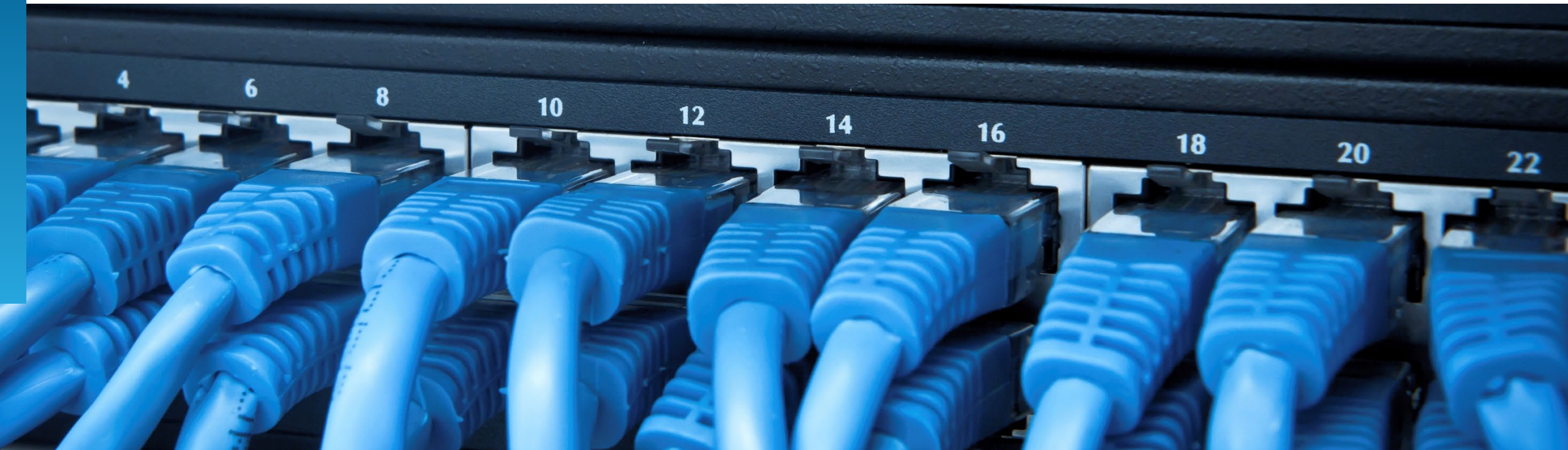


Cloud Services Provider Compendium 2023 – Europe

November 2023: Complimentary Abstract / Table of Contents



Our research offerings

This report is included in the following research program(s):

Cloud and Infrastructure

- ▶ Amazon Web Services (AWS)
- ▶ Application Services
- ▶ Artificial Intelligence (AI)
- ▶ Asset and Wealth Management
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- ▶ HealthTech
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- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing
- ▶ Interactive Experience (IX) Services
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For more information on this and other research published by Everest Group, please contact us:

Mukesh Ranjan, Vice President

Zachariah Chirayil, Practice Director

Kaustubh K, Senior Analyst

Deepti Sekhri, Senior Analyst

Bharanidharan SP, Senior Analyst

Praharsh Srivastava, Senior Analyst

Aastha Chakrawarty, Analyst

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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 cloud 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 European market, the cloud adoption strategy is being defined based on regional nuances. There is an increasing demand for sovereign private and hybrid cloud-hosted infrastructure to support enterprises' business enablement and growth. Additionally, there is a continued momentum toward AI-enabled automation and SRE-enabled operations to better manage their multi-cloud environment. Service Providers (SPs) have increased investments in regional delivery centers and are focusing on strengthening their regional partnerships with technology vendors in the public and private cloud space to provide compliant and accelerated cloud transformation services.

In this research, we present an assessment and detailed profiles of 27 cloud SPs featured on [Cloud Services PEAK Matrix® Assessment 2023 – Europe](#). 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.

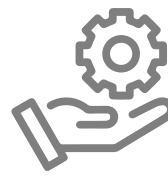
This report includes the profiles of the following 27 leading providers featured on the cloud services PEAK Matrix – Europe:

- **Leaders:** Accenture, Capgemini, HCLTech, Infosys, TCS, and Wipro
- **Major Contenders:** Atos, Cognizant, DXC Technology, Deloitte, EPAM, Fujitsu, GFT, IBM, Kyndryl, LTIMindtree, Microland, Mphasis, NTT DATA, Orange Business, Sopra Steria, and Tech Mahindra
- **Aspirants:** Aspire Systems, Sonata Software, UST, Unisys, and Virtusa

Scope of this report



Geography
Europe



Providers
27 cloud SPs



Services
Cloud Services

Overview and abbreviated summary of key messages

In this report, we present the assessment and detailed profiles of 27 SPs featured on the Cloud Services PEAK Matrix® Assessment 2023 – Europe. 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 27 leading SPs featured on the Cloud Services PEAK Matrix:

- **Leaders:** Accenture, Capgemini, HCLTech, Infosys, TCS, and Wipro
- **Major Contenders:** Atos, Cognizant, DXC Technology, Deloitte, EPAM, Fujitsu, GFT, IBM, Kyndryl, LTIMindtree, Microland, Mphasis, NTT DATA, Orange Business, Sopra Steria, and Tech Mahindra
- **Aspirants:** Aspire Systems, Sonata Software, UST, Unisys, and Virtusa

Service provider characteristics

- Leaders continue to showcase expertise in end-to-end integrated cloud transformation engagements with a credible suite of IP and solutions. They are providing a value-focused and sustainability-focused cloud transformation approach, making headway into disruptive themes such as generative AI to optimize their operational efforts and accelerate enterprises’ cloud journey
- 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 – Europe report has over 27 provider profiles

Cloud Services Provider Compendium 2023 – Europe

Provider 1 profile (page 1 of 6)

Overview

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

Overall cloud services revenue (2022)

<US\$200 million	US\$200-500 million	US\$500-1000 million
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Scope of coverage

Consulting services	Infrastructure design
Private cloud hosting	Cloud operations

Cloud Services Provider Compendium 2023 – Europe

Provider 1 profile (page 2 of 6)

Case studies

Case study 1: Enabling enhanced customer experience platform

Client: a leading European organizer of exhibitions, trade fairs and events

Business challenge
The client wanted to implement a new cloud-based data management of its entire information suite.

Solution

- Design, development, and integration of data Lake and Google Cloud Services
- Created new data Analytics and reporting System
- User training and application management for ensuring data integrity

Impact

- Improved operational costs savings
- Consolidated view of customer and increased customer personalized service delivery and communication capabilities

Cloud Services Provider Compendium 2023 – Europe

Provider 1 profile (page 3 of 6)

Solutions

Proprietary solutions (IPs/frameworks/accelerators/tools)

Solutions	Details
Solution 1	Provides AI/ML capabilities
Solution 2	Provides available AI/ML capabilities
Solution 3	Provides AI/ML capabilities

Cloud Services Provider Compendium 2023 – Europe

Provider 1 profile (page 4 of 6)

Partnerships

Partnerships (representative list)

Partners	Details
Partner 1	The partner provides AI/ML capabilities
Partner 1	This is a strategic partnership
Partner 1	This partnership helps client achieve its goals

Cloud Services – Provider Compendium 2023 – Europe

Provider 1 profile (page 5 of 6)

Investments and recent activities

Investments (representative list)

Investments	Details
Investment 1	Multiple investments
Investment 2	A network of investments

Cloud Services – Provider Compendium 2023 – Europe

Provider 1 profile (page 6 of 6)

Everest Group assessment – Major Contender

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 AWS- and Azure-focused cloud service engagements will benefit from Provider 1's end-to-end cloud services capabilities and integrated approach
- Those looking to engage in next-generation cloud services themes such as AI/ML, advanced analytics, IoT, and edge computing will benefit from Provider 1's credible capabilities
- Enterprises looking to engage with a service Provider 1 for cloud sovereignty and cloud sustainability will find the Provider 1 a good fit
- They will benefit from Provider 1's distributed delivery model with good nearshore and onshore delivery capabilities

Limitations

- Enterprises seeking in-depth industry cloud solutions need to carefully assess Provider 1's capabilities in their respective verticals as its industry cloud offerings lag in maturity compared to peers
- Those looking for complex workload transformation services on AWS and Azure might find the Provider 1 lagging its peers in terms of delivery capabilities
- Enterprises need to carefully assess its GCP-focused public cloud capabilities as it is still a work-in-progress due to limited co-innovation and joint GTM strategies with GCP
- Some clients have expressed challenges in driving change management process with Provider 1 and felt it to be inflexible in terms of accommodating requests beyond the contract

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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	November 2023
FinOps: a Critical Element of Enabling Cloud for Value (CfV)	Q4 2023

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Stay connected

Dallas (Headquarters)
info@everestgrp.com
+1-214-451-3000

Bangalore
india@everestgrp.com
+91-80-61463500

Delhi
india@everestgrp.com
+91-124-496-1000

London
unitedkingdom@everestgrp.com
+44-207-129-1318

Toronto
canada@everestgrp.com
+1-214-451-3000

Website
everestgrp.com

Social Media
 @EverestGroup
 @Everest Group
 @Everest Group
 @Everest Group

Blog
everestgrp.com/blog

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