

***ISG** Provider Lens™

Public Cloud - Solutions & Services

USA 2020

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

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All revenue references are in U.S. dollars (\$US) unless noted.

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ISG Provider Lens™

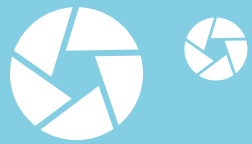
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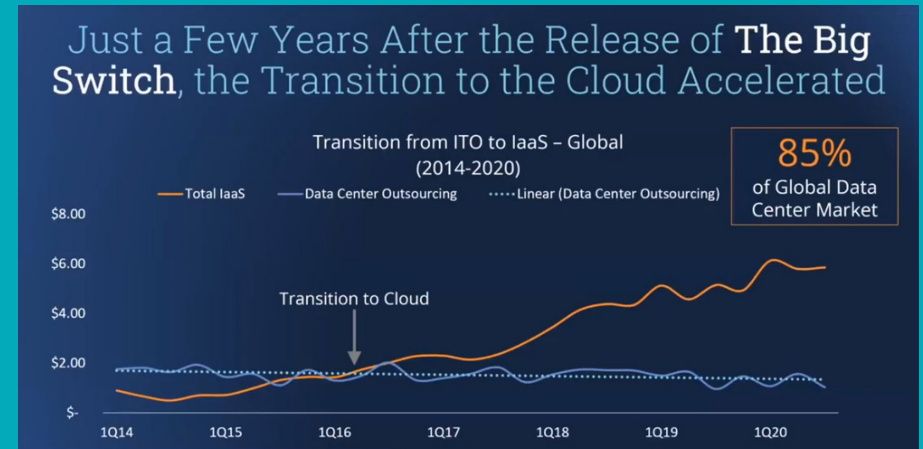


EXECUTIVE SUMMARY

In the last four quarters, public cloud adoption among the enterprise community in the U.S. has grown drastically. Enterprise demand has now shifted toward more of an as-a-service model, where the preference is for applications based on software as a service, pushing traditional providers and software vendors such as ERP companies to move their packaged applications to run in the cloud. One of the major reason enterprises accelerated their cloud adoption is the COVID-19 pandemic. The COVID-19 crisis has had a major impact in how everyone works. Many organizations wanted to rapidly move their employees to a work-from-home model, which required significant changes in their application and infrastructure landscapes. Traditional retail, travel and aviation are just a few of the industries that were severely impacted.

Many U.S. workers have been following social distancing norms and working from home for an extended period that started in March and continued throughout September. This has led to a massive rise in online shopping for almost everything, which has changed the business requirements to support work from home, increasing the overall cloud services demand. In addition, most large events — including trade shows, sporting events and festivals — have gone virtual this year. Cloud infrastructure is an ideal ecosystem for this because it provides the agility and scalability required to provide a better customer experience. Virtual business meetings are the new norm, which has often led to deals getting closed much faster. Almost all service providers reported non-stop service delivery, and some have exceeded their planned revenues advance with record-breaking growth, especially IaaS and PaaS providers.

In the recent ISG Index™ call (3Q20), we saw that the global 'as-a-service' market grew by 10.5% when compared to the same time last year, within which the IaaS market grew by 14% and SaaS by 2%. The major contributor to this increase was the growth of the hyperscalers, due to accelerated cloud adoption during the pandemic. ISG believes the IT spending will continue to grow and will be mainly driven by IaaS and cloud management providers. Although the traditional managed services business has remained flat across the globe in recent years, the as-a-service market has grown at 20% CAGR, and is more than 50% of the overall outsourcing market. With public cloud infrastructure getting commoditized, enterprises have been adopting cloud technology in their digital journeys, which corroborates the steady growth of IaaS since the last five years.



Source: 2020 SOURCING INDUSTRY CONFERENCE

Cloud-native focused transformation: Previously, there was high demand for lift-and-shift transitions as enterprises just wanted to move their applications to the public cloud. This approach later led to either refactoring or re-architecting the workload so that it performed better, which in turn raised costs. The irony was that enterprise moved to the cloud to save costs, but in the end, had to shell out more money to right-fit the application on the public cloud. Public cloud transformation engagements have now become more meaningful, as the trend has changed to moving the application to the public cloud in a cloud native way, which is mainly driven by the service provider community. Going cloud-native is now a big part of migrating workloads through recoding or re-architecting the application. Container technology and microservices have enabled enterprises to take full advantage of the flexibility and agility the public cloud architecture provides. Several other factors such as leveraging AI/ML and cognitive capabilities for data analysis are also driving enterprises to transform their applications and migrate to a public cloud environment. ISG also sees a strong demand in transforming legacy applications, which involves completely re-architecting or recoding workloads and moving from COBOL to Java-based applications, which work seamlessly on public cloud infrastructure.

Vertical-specific offerings bolstered by competencies: Service provider partnerships with hyperscalers have become even more important. Along with having a top-tier partnership level, service providers are also rapidly acquiring competency certifications from hyperscalers, which are like prized possessions or trophies. It's a seal of approval from the public cloud provider that the service provider has achieved expert knowledge in transformation in a particular domain or technology. This helps service providers instill

confidence in their prospective clients when they are selling their cloud transformation services. Service providers are also developing industry-specific specialized transformation capabilities to cater to particular verticals, including adhering to their industry compliance and guidelines.

Multi-cloud is the new norm: Applications work differently on different public cloud platforms, and each one of them has certain exclusive capabilities and expertise. For example, AWS offers a broad compute portfolio from basic to high compute requirements for any application development or management. Microsoft Windows and its ancillary product suite are easiest to migrate on Microsoft Azure platform. And Google Cloud Platform (GCP) offers the ideal infrastructure for big data analytics leveraging AI/ML technologies and high graphical and compute-intensive workloads. We have observed that hyperscalers are now being treated as a partner rather than just another infrastructure provider. Enterprises and service provider communities now understand the pros and cons of each hyperscaler and are moving their workloads accordingly. In addition, they do not want to get stuck with one provider because it hinders innovation and sometimes results in high costs. Many enterprise customers have already started to use two or more hyperscalers for different applications, and ISG believes that this trend is going to scale up considerably. But there is a downside to this setup. Several enterprises have mentioned that they find infrastructure orchestration has become difficult because of the several moving parts and the complexity of managing a hybrid multi-cloud environment. To help counter this problem, several service providers and vendors have developed robust cloud management platforms (CMPs), and enterprises are now adopting and using these tools

to make their lives easier. Other challenges that enterprises should be aware of with a multi-cloud environment include vendor lock-in by the public cloud provider and the need for interoperability between two or more public cloud providers.

Enhanced managed services: The managed public cloud ecosystem has been growing at a faster rate as overall cloud adoption rises. Enterprises need a helping hand because they are finding it difficult to manage the hybrid and multi-cloud infrastructure. The focus is mainly on cost optimization and moving enterprise resources to core activities rather than on cloud infrastructure management. Also, as the world adapts to working from home, it has become imperative for enterprises to outsource their cloud management and focus on building and innovating new solutions for their clients. Service providers are using DevOps and infrastructure-as-code (IaC) practices as well as artificial intelligence-led automation with out-of-the box API integration capabilities to manage cloud infrastructures efficiently. Automation is still a big part of cloud operations management and is being leveraged along with intelligent DevOps practice for remediation and self-healing capabilities that offer better user experience. Partnerships with hyperscale providers have moved to a strategic level where the vendor and provider work together to develop new solutions and have a joint go-to-market strategy.

Growing demand for cloud GRC services: Enterprises want to move to cloud environments quickly, and as cloud infrastructure landscape is getting complex and intertwined day by day, which may cause several security flaws leading to client data exposed in wrong hands. Some prominent challenges enterprises face while engaging into a cloud transformation are lack of integration among various systems in the organization,

vendor/provider management, of integrated risk reporting and financial impact. All these are addressed by governance, risk management and compliance (GRC) service providers. ISG is seeing an increase in demand for integrated solutions of GRC services to help manage cloud transformation engagements in a secure manner. GRC providers have developed robust frameworks that take regulatory, legal, business, and risk environments into account for risk management and follow a “secure by design” methodology.

Rising demand of IaaS and PaaS: Almost all public cloud providers have seen an increase in their business due to the sudden spike in demand for using cloud services and also due to enterprises preferring a multi-cloud setup rather than sticking to a single cloud provider. AWS has a first-mover advantage and has been entrenched in the public cloud infrastructure domain for over a decade. Microsoft Azure offerings are now getting more traction, especially with large enterprises that have legacy Microsoft dependencies such as Office 365 and Windows integration, which makes Azure a popular choice. Azure is catching up fast and is closer to AWS than ever before. Google, too, is catching up and has increased its market reach as several customers prefer GCP for specific use cases such as analytics, big data, and large compute and graphics-intensive workloads.

HANA is the new SAP way: In the last few years, enterprises had plans to move their SAP workloads to a cloud environment, but it was not a high priority. Due to the pandemic, enterprises have accelerated their plans. The overall impression of moving to SAP HANA is positive because it brings several benefits like improved performance and efficiency over legacy systems, better setup for faster innovation, optimizing of existing business

processes, faster access to analytics, easier to deliver data, elimination of customization and removal of unnecessary codes. But there have been some pain points experienced during implementation of SAP HANA. These include it being more complex than expected, a difficulty in integration with third-party systems and products, a lack of skilled staff to complete the project, software defects, integration with other SAP solutions, the need to clean up custom code and unanticipated costs.

Enterprises need to choose a public cloud infrastructure provider to host their HANA workloads very wisely, considering factors like its data center proximity, long-term pricing and discounts, and the flexibility to move to another vendor. Hosting SAP HANA on public cloud infrastructure requires knowledge of complexities involved in the migration process and then in operations. Providers must have a clear strategy and structured approach to handling SAP S/4HANA workloads and large-scale HANA databases. Leading cloud infrastructure providers of HANA services are coping up with fast-paced market developments, which include many ancillary cloud services. Such services include supporting infrastructure for other SAP offerings, cost analysis and related operational analysis, provisioning and setup of the technical infrastructure, and go-live and operations support. Deployment normally requires close cooperation with SAP for compliance with related standards.



Introduction

Simplified illustration

Public Cloud – Solutions and Services 2020	
Consulting and Transformation Services for Large Accounts	Consulting and Transformation Services for Midmarket
Governance, Risk and Compliance Services	Managed Public Cloud Services for large Accounts
Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services
Hyperscale Infrastructure and Platform Services	

Source: ISG 2020

Definition

The growth in public cloud adoption among enterprises and the maturity of the cloud industry are creating a major impact on both enterprises and IT service providers as well as on business models, requiring increased acceptance of digital initiatives and creating risks of obsolescence. Considering the widespread adoption of the as-a-service model, enterprises need to continuously evaluate cloud services and IT providers globally.

ISG reports that the strong demand for digital transformation is driving global contracts for cloud products and services, including infrastructure as a service (IaaS) and platform as a service (PaaS). According to the 1Q 2020 ISG Index™, the global market has grown 7 percent in combined market annual contract value (ACV) since Q4 2019 to reach its current value of \$14.8 billion. In the same period, as-a-service ACV has increased by 11 percent to reach \$7.9 billion. Also, the IaaS market grew 18 percent to \$5.9 billion and the SaaS market dropped by 4 percent to \$2 billion. The growth in numbers in the as-a-service area indicates the shift to and preference for digital technologies to reduce costs, increase productivity, improve responsiveness to business requirements, improve service to end users and ultimately drive innovation.

Definition (cont.)

The ISG Provider Lens™ study offers IT decision-makers:

- Strengths and weaknesses of relevant providers.
- A differentiated positioning of providers based on competitive strength and portfolio attractiveness.
- Focus on several markets including global, the U.S., Germany, Switzerland, the U.K, France, the Nordics and Brazil.

This study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also leverage information from these reports in evaluating their current vendor relationships and potential new engagements.

Scope of the Report

The Public Cloud – Solutions & Service Partners 2020 U.S. report will assist buyers while reviewing a significant cloud transformation strategy and the capabilities of service providers in numerous geographies. Enterprise clients will also benefit from the study because it incorporates ISG's strengths in global sourcing advisory, contract knowledge databases, regional research and expertise in technology ecosystems and innovations. This study includes various reports from seven quadrants that cover cloud service models. Not all quadrants are covered in each geography. Coverage depends on provider responses, participation and relevance. Quadrants that are not covered in a region may be covered in future studies. The geographic report areas include global, the U.S., the U.K., Germany, Switzerland, the Nordics, France and Brazil.

Definition (cont.)

The full set of quadrants covered in this study are:

- **Consulting and Transformation Services:** This quadrant assesses providers of advisory and migration services for public cloud infrastructure, primarily AWS, Google Cloud Platform (GCP) and Microsoft Azure.
- **Governance, Risk and Compliance Services:** Here we assess providers such as consulting firms that offer various frameworks, policies, processes and functions to ensure enterprise cloud workloads are run in a secure and compliant environment, regardless of location.
- **Managed Public Cloud Services:** This quadrant covers companies that provide ongoing management and support services on top of public cloud infrastructure, primarily AWS, GCP and Microsoft Azure.
- **Hyperscale Infrastructure and Platform Services:** In this quadrant, we evaluate service providers that provide virtual compute resources, middleware and software on a public cloud. These vendors also include those in the hyperscaler PaaS segment, which offer multiple microservices and runtime engines for predefined, cloud-based application development processes that typically address full lifecycle needs for a developer.
- **SAP HANA Infrastructure Services:** This quadrant assesses cloud infrastructures best suited to host the SAP software portfolio, with emphasis on SAP S/4HANA workloads and large-scale HANA databases.

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The Leaders among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The Product Challengers offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the Leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or their weak footprint within the respective target segment.

Market Challenger

Market Challengers are also very competitive, but there is still significant portfolio potential and they clearly lag behind the Leaders. Often, the Market Challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and therefore have some potential to optimize their portfolio and increase their attractiveness.

Contender

Contenders are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

Rising Stars are usually Product Challengers with high future potential. Companies that receive the Rising Star award have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12 to 24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service. In dependence of the market ISG positions providers according to their business sweet spot, which can be the related midmarket or large accounts quadrant.

Public Cloud - Solutions & Services - Quadrant Provider Listing 1 of 6

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Governance, Risk and Compliance Services	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services
2nd Watch	● Contender	● Not in	● Not in	● Contender	● Not in	● Not in	● Not in
Accenture	● Leader	● Not in	● Rising Star	● Leader	● Not in	● Not in	● Not in
Alibaba	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in	● Contender
AllCloud	● Not in	● Contender	● Not in	● Not in	● Contender	● Not in	● Not in
Atos	● Product Challenger	● Not in	● Product Challenger	● Contender	● Not in	● Not in	● Not in
AWS	● Not in	● Not in	● Not in	● Not in	● Not in	● Leader	● Leader
Birlasoft	● Not in	● Contender	● Not in	● Not in	● Contender	● Not in	● Not in
Capgemini	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in	● Not in
CenturyLink	● Not in	● Contender	● Not in	● Not in	● Contender	● Not in	● Not in
CGI	● Not in	● Product Challenger	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Coforge	● Not in	● Product Challenger	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Cognizant	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in	● Not in
Deloitte	● Market Challenger	● Not in	● Leader	● Market Challenger	● Not in	● Not in	● Not in

Public Cloud - Solutions & Services - Quadrant Provider Listing 2 of 6

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Governance, Risk and Compliance Services	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services
Digital Ocean	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in	● Contender
DXC	● Product Challenger	● Not in	● Not in	● Product Challenger	● Not in	● Not in	● Not in
Ensono	● Not in	● Contender	● Not in	● Not in	● Product Challenger	● Not in	● Not in
EY	● Not in	● Not in	● Leader	● Not in	● Not in	● Not in	● Not in
Fujitsu	● Not in	● Product Challenger	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Google	● Not in	● Not in	● Not in	● Not in	● Not in	● Rising Star	● Leader
HCL	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in	● Not in
Hexaware	● Not in	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in
IBM	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Product Challenger	● Product Challenger
Infinite	● Not in	● Contender	● Not in	● Not in	● Contender	● Not in	● Not in
Infosys	● Rising Star	● Not in	● Product Challenger	● Leader	● Not in	● Not in	● Not in
KPMG	● Contender	● Not in	● Leader	● Not in	● Not in	● Not in	● Not in
LTI	● Not in	● Leader	● Contender	● Not in	● Rising Star	● Not in	● Not in

Public Cloud - Solutions & Services - Quadrant Provider Listing 3 of 6

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Governance, Risk and Compliance Services	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services
Metricstream	● Not in	● Not in	● Contender	● Not in	● Not in	● Not in	● Not in
Microland	● Not in	● Contender	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Microsoft	● Not in	● Not in	● Not in	● Not in	● Not in	● Leader	● Leader
Mindtree	● Not in	● Leader	● Contender	● Product Challenger	● Leader	● Not in	● Not in
Mphasis	● Not in	● Product Challenger	● Not in	● Not in	● Product Challenger	● Not in	● Not in
NTT	● Market Challenger	● Not in	● Not in	● Market Challenger	● Not in	● Not in	● Not in
NTT DATA	● Product Challenger	● Not in	● Not in	● Rising Star	● Not in	● Not in	● Not in
Oracle	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in	● Product Challenger
OVHcloud	● Not in	● Not in	● Not in	● Not in	● Not in	● Contender	● Contender
PwC	● Market Challenger	● Not in	● Leader	● Not in	● Not in	● Not in	● Not in
Rackspace Technology	● Not in	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in
SAP	● Not in	● Not in	● Not in	● Not in	● Not in	● Product Challenger	● Not in
TCS	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in	● Not in

Public Cloud - Solutions & Services - Quadrant Provider Listing 4 of 6

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Governance, Risk and Compliance Services	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services
Tech Mahindra	● Contender	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in
TO THE NEW	● Not in	● Contender	● Not in	● Not in	● Contender	● Not in	● Not in
Trianz	● Not in	● Product Challenger	● Not in	● Not in	● Product Challenger	● Not in	● Not in
T-Systems	● Not in	● Not in	● Not in	● Not in	● Not in	● Contender	● Not in
Unisys	● Product Challenger	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in
UST Global	● Not in	● Product Challenger	● Not in	● Product Challenger	● Leader	● Not in	● Not in
Virtusa	● Not in	● Contender	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Virtustream	● Not in	● Not in	● Not in	● Not in	● Not in	● Product Challenger	● Not in
Wipro	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in	● Not in
Zensar	● Not in	● Contender	● Not in	● Not in	● Product Challenger	● Not in	● Not in



Public Cloud - Solutions & Services Quadrants

ENTERPRISE CONTEXT

Consulting and Transformational Services for Large Accounts

This quadrant is relevant to large enterprises in the U.S. that are evaluating consulting and transformation service providers. In this quadrant report, ISG lays out the current market positioning of these providers in the U.S. and how they can address key challenges in large enterprises' migration journey to the public cloud environment.

Enterprises have been reluctant to migrate to the public cloud because of difficulties such as assessing the workloads, change management, a shortage of talented specialists or skill gaps, and uncertainties about integration of existing infrastructure. In 2020, however, the urge to move workloads to public cloud has become more pressing than ever, and many enterprises are accelerating their digital transformation. This report can help with choosing the right provider to overcome the challenges and address the difficulties mentioned.

For enterprises, the benefits of working with consulting and transformation service providers include experienced workload assessment, transformation roadmaps, advisory on workload migration, re-architecture of legacy applications and integration of automation capabilities.

ISG sees that enterprises are increasingly shifting their focus from lift and shift toward long-term application modernization, hence re-architecture, code reviews and cloud-native environments are on the rise in the U.S.

IT leaders should read this report to better understand the relative strengths and weaknesses of consulting and transformation service providers, as well as to help them lead the digital transformation drive in their enterprises.

Software development and technology leaders should read this report to understand the positioning of consulting and transformation service providers, learn how those providers' offerings can impact an enterprise's ongoing transformation initiatives, and discover the benefits they can achieve by moving to the cloud.

Sourcing, procurement, and vendor management professionals should read this report to develop a better sense of the current landscape of consulting and transformation service providers in the U.S.

CONSULTING AND TRANSFORMATIONAL SERVICES FOR LARGE ACCOUNTS

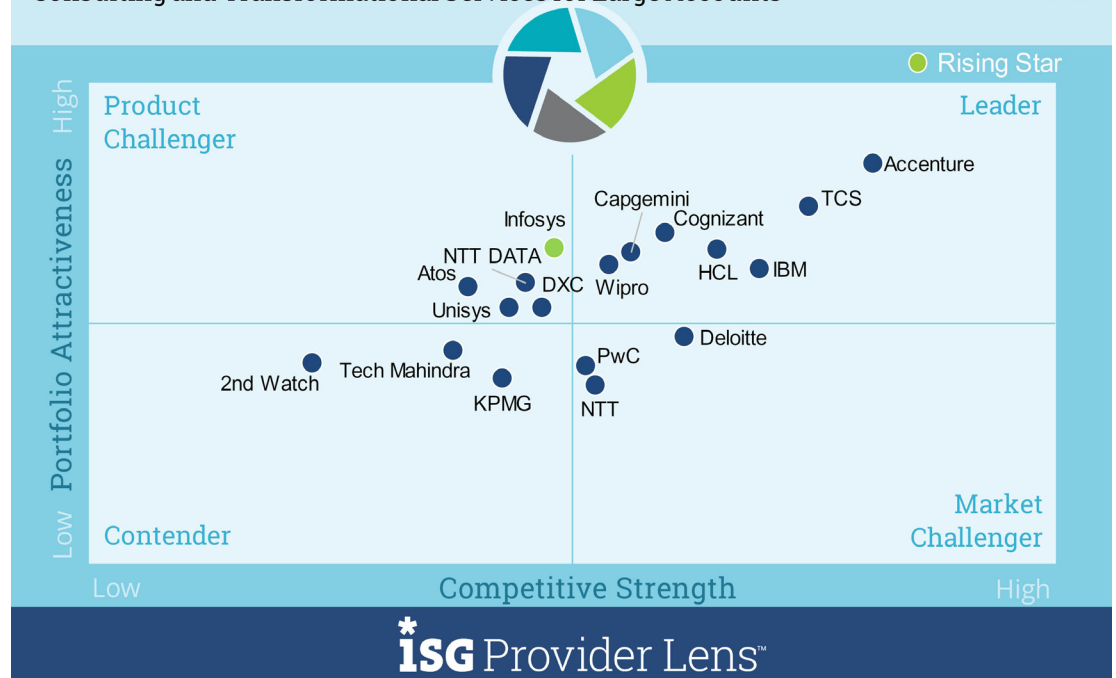
Definition

Public cloud enables enterprises to achieve agility and scalability without investing in their own infrastructure, thus making it an integral aspect of digital transformation. Consulting and transformation service providers partner with public cloud providers to manage customer-specific complexities of adopting and deploying public cloud solutions. Their services typically include the following:

- Consulting services:** Designing a business case for cloud; assessing the workload for migration; building a transformation roadmap, which includes addressing risk and compliance issues; and advising on migrating applications from the existing environment to that of a public cloud provider.
- Transformation services:** Designing and building the cloud architecture/environments, migrating and integrating applications, and optimizing the architecture to harness the cloud-computing features and benefits.

Public Cloud – Solutions and Services
 Consulting and Transformational Services for Large Accounts

2020
 U.S.



Source: ISG Research 2020

CONSULTING AND TRANSFORMATIONAL SERVICES FOR LARGE ACCOUNTS

Definition (cont.)

For this quadrant, we exclude the creation of private clouds because they are covered in a separate study on Next-Gen Private/Hybrid Cloud Data Center Service and Solution Providers. Accordingly, the Public Cloud Consulting and Transformation Services quadrant encompasses the adoption of public cloud services and their integration with on-premises environments, which can include private clouds.

Eligibility Criteria

- Public cloud transformation thought leadership.
- Methods and frameworks to analyze the client IT landscape.
- Experience in the planning and implementation of multi-cloud services.
- Application migration experience including templates, automation engines and partnerships with independent software vendors (ISVs).
- Hyperscale provider-related partner program certifications from the solutions standpoint.
- Competencies that are specific to a vertical (industry) or technology.
- Client references and projects or use cases.
- Hybrid cloud integration and support services.

CONSULTING AND TRANSFORMATIONAL SERVICES FOR LARGE ACCOUNTS

Observations

In this category, service providers are focusing on innovating their transformation services by leveraging AI/ML technologies and cognitive capabilities to serve large enterprises' diverse transformation requirements. Due to the rise in cloud adoption because of various reasons, rapid and accelerated transformation solutions are being developed. Providers are leveraging frameworks and blueprints and building accelerators and migration tools to quickly move enterprise workloads on public cloud environment. Vertical specific tools and platforms has also become of prime importance to cater to industry specific clients who have strict guidelines while moving to cloud environments.

Service provider's partnerships with hyperscalers has become even more important. Along with having a top tier partnership level, service providers are also rapidly acquiring competency certifications from hyperscalers, which are like prized possessions or trophies. It's like a seal of approval from the public cloud provider that the service provider has achieved

expert knowledge in transformation in a particular domain or technology. This helps service providers instill confidence in their prospective clients when they are selling their cloud transformation services.

In this quadrant, we evaluated 18 providers, of which seven are Leaders and one is a Rising Star.

- **Accenture's** focus on building dedicated consulting practices has helped its clients with their cloud transformation journey. It employs the highest number of certified cloud professionals and competencies among its competitors. Accenture's myNAV helps its clients select the right architecture and cloud solution by reducing migration risks.
- **Capgemini** has extensive experience in public cloud transformation services. Capgemini's eAPM platform assesses the entire IT landscape and suggests options for migration, after which Capgemini deploys its Cloud Migration Factory solution to migrate workloads to the relevant public cloud.
- **Cognizant** offers industry-specific solutions to help clients' cloud transformation journey. The company has developed robust frameworks and tools for migration such as Cognizant FEGO, its intelligent acceleration platform, for faster and smarter application transformation to cloud.
- **HCL** has been developing its own products and platforms for helping clients with an "as-a-service" economy. The firm has also been developing accelerators and an AI-based platform to drive cloud transformation engagements.

CONSULTING AND TRANSFORMATIONAL SERVICES FOR LARGE ACCOUNTS

Observations (cont.)

- **IBM** provides an array of deployment options along with a large number of cloud-certified FTEs across hyperscalers like AWS, Azure, GCP and IBM Cloud. IBM has a strong security practice and has its own IaaS offering, IBM Cloud, which helps with large enterprises infrastructure needs.
- **TCS** has vast experience in modernizing clients' infrastructure and moving them to public cloud. TCS' "Innovation Garage" is powered by a cloud ecosystem that leverages cloud-native tools and accelerators for an AI/ML-led cloud transformation.
- **Wipro's** Cloud Studio platform enables enterprises to move to the cloud rapidly and efficiently. Wipro has also helped several enterprises to leverage container technologies and embrace serverless architecture for migration.
- **Infosys** is identified as a Rising Star this year and is growing rapidly with its cloud center of excellence and containerization focus. Its recently launched Cobalt solution has strong, vertical-specific, cloud solution blueprints that enable enterprises' public cloud migration journey with a cloud-native approach.



ENTERPRISE CONTEXT

Consulting and Transformational Services for Midmarket

This quadrant is relevant to midsized enterprises in the U.S. that are evaluating consulting and transformation service providers. In this quadrant report, ISG lays out the current market positioning of these providers in the U.S. and how they can address key challenges in midsized enterprises' migration journey to the public cloud environment.

Enterprises have been reluctant to migrate to the public cloud owing to difficulties such as properly assessing the workloads, change management, a shortage of talented specialists or skill gaps, and uncertainties about integration of existing infrastructure. In 2020, however, the urge to move workloads to public cloud has become more pressing than ever, and many enterprises are accelerating their digital transformation. This report can help with choosing the right provider to overcome the challenges and address the difficulties as mentioned.

For enterprises, the benefits of working with consulting and transformation service providers include experienced workload assessment, transformation roadmaps, advisory on workload migration, re-architecture of legacy applications and integration of automation capabilities.

Midmarket clients have fewer complex requirements and smaller-scale projects than large enterprises, and they prefer providers with strong local delivery capabilities and high integration capabilities. Most midsize clients look for service providers with consulting and migration capabilities and the ability to offer a ready-to-use framework and cultural integration in the transformation journey.

ISG sees that enterprises are increasingly shifting their focus from lift and shift to long-term application modernization, hence re-architecture, code reviews and cloud-native environments are on the rise in the U.S.

IT leaders should read this report to better understand the relative strengths and weaknesses of consulting and transformation service providers, as well as to help them lead the digital transformation drive in their enterprises.

Software development and technology leaders should read this report to understand the positioning of consulting and transformation service providers, learn how those providers' offerings can impact an enterprise's ongoing transformation initiatives, and discover the benefits they can achieve by moving to the cloud.

Sourcing, procurement, and vendor management professionals should read this report to develop a better sense of the current landscape of consulting and transformation service providers in the U.S.

CONSULTING AND TRANSFORMATIONAL SERVICES FOR MIDMARKET

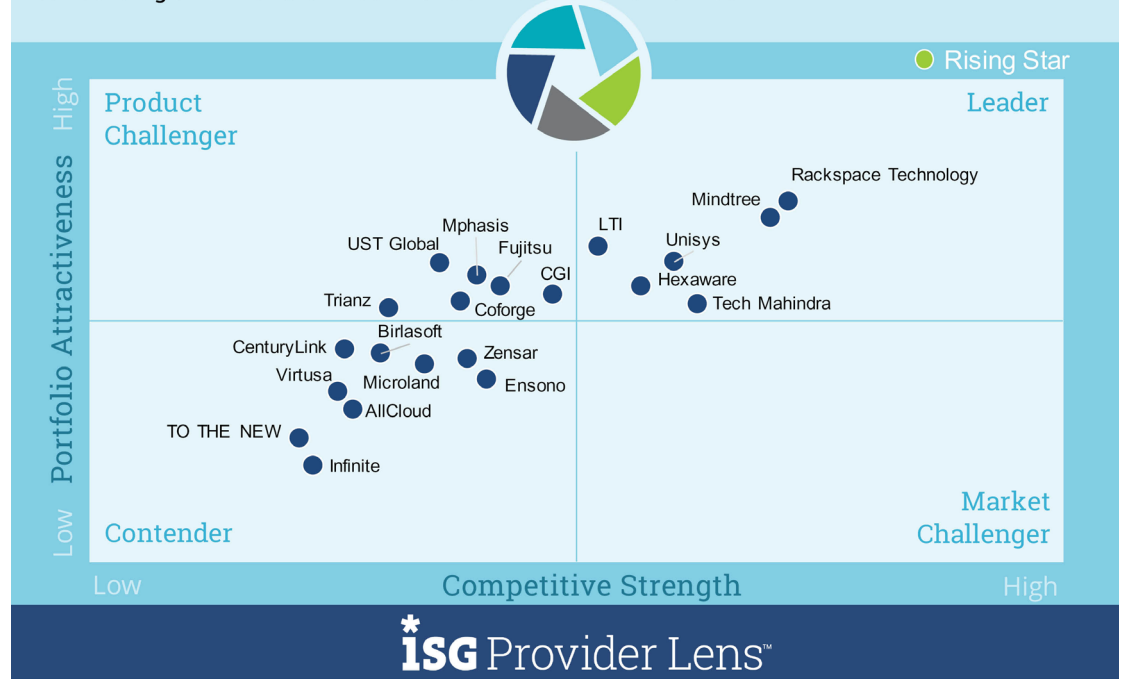
Definition

Public cloud enables enterprises to achieve agility and scalability without investing in their own infrastructure, thus making it an integral aspect of digital transformation. Consulting and transformation service providers partner with public cloud providers to manage customer-specific complexities of adopting and deploying public cloud solutions. Their services typically include the following:

- Consulting services:** Designing a business case for cloud; assessing the workload for migration; building a transformation roadmap, which includes addressing risk and compliance issues; and advising on migrating applications from the existing environment to that of a public cloud provider.
- Transformation services:** Designing and building the cloud architecture/environments, migrating and integrating applications and optimizing the architecture to harness the cloud-computing features and benefits.

Public Cloud – Solutions and Services Consulting and Transformational Services for Midmarket

2020
U.S.



Source: ISG Research 2020

CONSULTING AND TRANSFORMATIONAL SERVICES FOR MIDMARKET

Definition (cont.)

For this quadrant, we exclude the creation of private clouds because they are covered in a separate study on Next-Gen Private/Hybrid Cloud Data Center Service and Solution Providers. Accordingly, the Public Cloud Consulting and Transformation Services quadrant encompasses the adoption of public cloud services and their integration with on-premises environments, which can include private clouds.

Eligibility Criteria

- Public cloud transformation thought leadership.
- Methods and frameworks to analyze the client IT landscape.
- Experience in the planning and implementation of multi-cloud services.
- Application migration experience including templates, automation engines and partnerships with independent software vendors (ISVs).
- Hyperscale provider-related partner program certifications from the solutions standpoint.
- Competencies that are specific to a vertical (industry) or technology.
- Client references and projects or use cases.
- Hybrid cloud integration and support services.

CONSULTING AND TRANSFORMATIONAL SERVICES FOR MIDMARKET

Observations

In the midmarket segment, service providers in the U.S. have a strong focus on automated migration of workloads to the cloud. Enterprise clients are willing to engage in a multi-sourcing model and work with these midsized providers because of their flexibility and responsiveness. With cloud adoption accelerating, the focus is now on gradually increasing on transforming applications by leveraging cloud-native tools. Although SLAs are still tactical, enterprises are experimenting with strategic outcome-focused deals.

Service providers' partnerships with hyperscalers have become even more important. Along with having a top-tier partnership level, service providers are also rapidly acquiring competency certifications from hyperscalers, which are like prized possessions or trophies. It's like a seal of approval from the public cloud provider that the service provider has achieved expert knowledge in transformation in a particular domain or technology. This helps service providers instill confidence in their prospective clients when they are selling their cloud transformation services.

In this quadrant, there were 21 providers evaluated and featured, out of which we identified six Leaders.

- **Hexaware** has strengthened its public cloud consulting practice with the acquisition of Mobiquity last year. The acquisition has bolstered its Cloudify Everything offering and gives it AWS Premier Consulting Partner status.
- **LTI** offers tool-based automation assessment that leverages several of its intellectual properties (IPs) such as RapidAdopt and PaaSify, along with its MOSAIC platform to offer cloud transformation services.
- **Mindtree** delivers end-to-end cloud transformations services at scale and has a strong presence in the U.S. The firm has Microsoft Azure expertise and leverages its DevOps and continuous testing capabilities along with automated migration process to accelerate the transformation journey.
- **Rackspace Technology's** acquisition of Onica (an AWS Premier Consulting Partner) in 2019 has boosted its migration capabilities. The acquisition significantly increased its total count of AWS competencies to 14 and also its total number of hyperscale-certified FTEs.
- **Tech Mahindra** leverages its migration expertise with its in-house tools and frameworks to assess and migrate data and applications to the cloud. Tech Mahindra's MAC toolkit enables rapid migration of workloads to the public cloud.
- **Unisys** has preconfigured templates developed by its cloud experts for rapid cloud transformations. Unisys leverages its CloudForte solution's advisory module for public-cloud consulting engagements.

UNISYS

Overview

Unisys is a global information technology company headquartered in Pennsylvania. An AWS Advanced Consulting Partner and a Silver consulting partner certification from Microsoft Azure, it is in the process of upgrading its certifications. Unisys has strong presence in federal, state and local government agencies and in the banking, financial services and insurance and energy verticals.

Strengths

Rapid migration focus: Unisys has helped many customers move to the cloud quickly by leveraging preconfigured templates developed by its cloud experts. Enterprises can then accelerate their adoption of industry best practices for development, testing and deployment of solutions in a cloud-native or hybrid environment. The company is also increasing its certified FTE count in cloud-native technologies such as Kubernetes.

Comprehensive consulting solution: The company leverages its CloudForte solution's advisory module for public cloud consulting engagements. It contains discovery, assessment, strategy and auditing services. The platform has improved its portfolio by adding automation blueprints and reference architectures for accelerated migration as well as containerization modules for application modernization, which have been more in demand in the last year.

Strong security portfolio: Unisys is very well known for its security services in the U.S. market. It offers robust security solutions for transformation engagements through its security products and services like Stealth™ and TrustCheck™. Its consultants provide executive advisory services on security, compliance, strategic planning and mobile device security strategies while moving workloads to the cloud.

Caution

Most of Unisys' transformation engagements based on client demand are lift-and-shift migrations, an approach the competition has outgrown. Unisys needs to focus on helping clients migrate their workloads the cloud-native way, rather than just moving them to the public cloud.



2020 ISG Provider Lens™ Leader

Unisys is an experienced service provider that uses its many intellectual properties to drive secure and rapid application migration to the public cloud.

ENTERPRISE CONTEXT

Governance, Risk and Compliance Services

This report is relevant to enterprises across industries in the U.S. and will help them evaluate providers of governance, risk and compliance (GRC) services. In this quadrant report, ISG highlights the current market positioning of these providers in the U.S. and the way they address the key challenges that confront enterprise clients in the country.

Enterprises face challenges in maintaining their public cloud governance and compliance process due to a growing number of threats to data security and a strict regulatory environment. Sometimes enterprises end up paying huge penalties and need to rework their cloud architecture, which can result in significant cost overruns and raise data security concerns about migration. The main reasons are a lack of integration among various systems in the organization, an inability to integrate risk analytics, shortage of skilled professionals, and increased collaboration with partners that can add complexity to the governance process and data privacy regulations. In addition, hybrid and multi-cloud environments can make it difficult for enterprises to manage their GRC process.

They can benefit from GRC providers, including consulting firms, that can manage their public cloud governance process. Enterprises can leverage GRC providers' frameworks, policies, processes and functions to ensure their workloads are run in a secure and compliant environment. GRC providers can help by offering their domain expertise and services around a robust cloud operating model, security, tax, audit, and risk assessment to make the public cloud services compliant with regional and industry-specific regulations that reduce operational costs.

ISG sees that enterprises in the U.S. are migrating their workloads to public cloud platforms and are looking for an integrated solution of GRC services and data governance protocols exclusively for the cloud. Also, enterprises with significant workloads in the public cloud are looking for compliance automation solutions to ensure security controls at all levels and compliance with various regulations.

IT leaders should read this report to better understand the relative strengths and weaknesses of governance, risk and compliance service providers, as well as to help them lead the digital transformation drive in their enterprises.

Software development, technology and security leaders should read this report to understand the positioning of GRC service providers and learn how those providers' offerings can impact ongoing transformation initiatives.

Sourcing, procurement, and vendor management professionals should read this report to develop a better sense of the current landscape of governance, risk and compliance providers in the U.S.

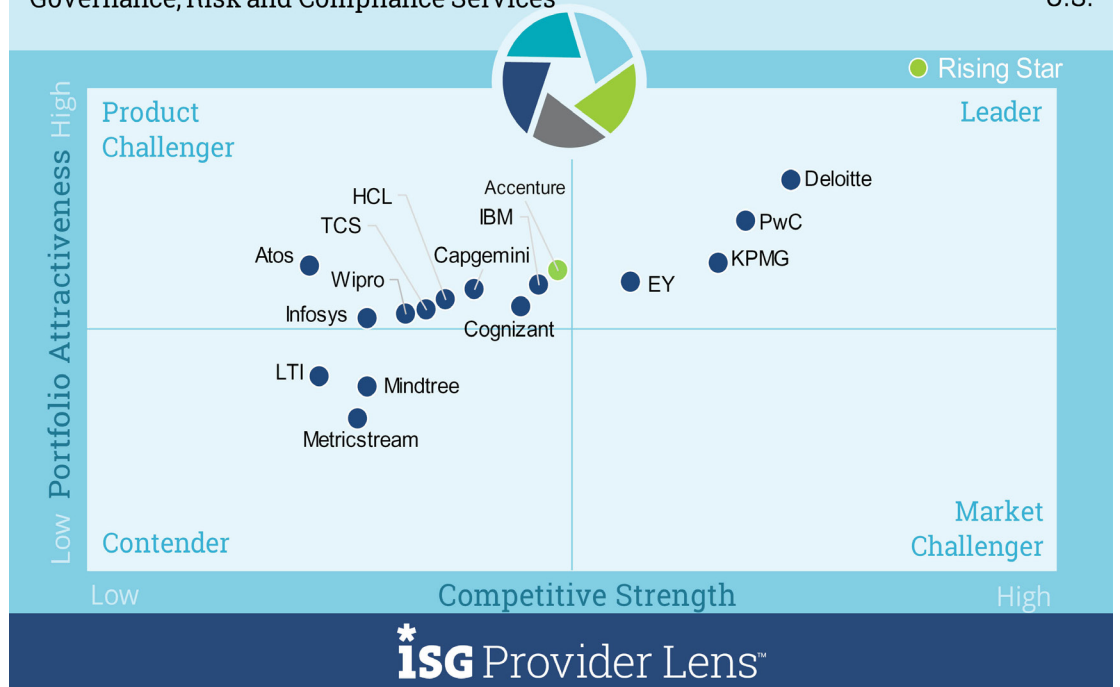
GOVERNANCE, RISK AND COMPLIANCE SERVICES

Definition

In this quadrant, service providers such as consulting firms offer various frameworks, policies, processes and functions to ensure enterprise cloud workloads are run in a secure and compliant environment, regardless of location. Therefore, a framework and a set of policies for the use of cloud-computing services in a secure environment are needed and often flanked by public cloud transformation activities. Relevant providers are third-party independent organizations that offer unbiased governance, risk and compliance (GRC) services. To successfully implement cloud solutions, it is necessary to focus on the business architecture by taking into account the business case, cloud operating model, vendor evaluation and selection, readiness, and maturity of the entire ecosystem. Key services include organizational change management (OCM), stakeholder's awareness and responsibilities alignment, application migration, cloud innovation lab establishment, security, tax, audit, and finance risk-assessment to make public cloud service use fully compliant with regional and industry-specific regulations.

Public Cloud – Solutions and Services
Governance, Risk and Compliance Services

2020
U.S.



Source: ISG Research 2020

GOVERNANCE, RISK AND COMPLIANCE SERVICES

Eligibility Criteria

- Ability to align technology requirements with business goals (new products, reduced time-to-market and increased profitability).
- Should be able to offer optimization at an operational level through governance policies (optimize service availability, minimize stakeholders' specific risk and reduce dependency on legacy application stacks).
- Ability to provide governance architecture from the time of inception for future growth and easy service integration.
- Should adhere to security certifications such as HIPAA, GDPR, BSI C5, SOC, NIST, ISO, PCI DSS, FISMA, ANSSI and FedRAMP.
- Experience in defining and, above all, in mapping custom policies and organizational structure, including clear roles and responsibilities, with new requirements.
- Perform cloud audits and services like cloud security posture management (CSPM) for a broad spectrum of cloud environments.
- Perform accounting, tax and legal procedures in cloud transformation projects to mitigate risk.

Observations

Enterprises want to move to cloud environments quickly, and as cloud infrastructure landscape is getting complex and intertwined day by day, which may cause several security flaws leading to client data exposed in wrong hands. Some prominent challenges enterprise face while engaging into a cloud transformation are lack of integration among various systems in the organization, vendor/provider management, inability to integrate risk analytics, lack of integrated risk reporting and financial impact and more. All these are addressed by the GRC service providers. ISG is seeing an increase in demand for integrated solutions of GRC services, for managing cloud transformation engagements in a secure manner. GRC professionals are creating frameworks which ensures following of mandatory data compliance guidelines for risk management. GRC providers have developed robust GRC frameworks which take regulatory, legal, business, and risk environments into account for integrated risk management and follow a 'secure by design' methodology.

In this quadrant, we evaluated 16 providers, out of which we identified four Leaders and one Rising Star.

- **Deloitte** has a large market presence in the U.S., with several offices and a workforce focused on providing high-quality consulting and GRC services. Through its partnership with RSA to offer secure GRC services and its proprietary risk intelligence map, Deloitte help enterprises with their cloud transformation engagements.

GOVERNANCE, RISK AND COMPLIANCE SERVICES

Observations (cont.)

- **EY** has demonstrated expertise in risk management and offers robust GRC frameworks and blueprints. It also provides a solution for top management that helps them understand the risks involved during any cloud transformation engagements and enables them to make decisions quickly.
- **KPMG** offers its proprietary GRC model along with an automated third-party risk assessment solution. It also provides dashboards and macro-level analysis to support client efforts to achieve maximum efficiency in any cloud transformations.
- **PwC** provides a strong, integrated cloud enablement framework for its GRC services. It has a sharp focus on banking customers and has developed specialized banking-related cloud GRC solutions.
- **Accenture** is identified as a Rising Star with a growing portfolio of GRC services. The company strongly focuses on federal and government agencies and has a division dedicated to providing cloud GRC services.



ENTERPRISE CONTEXT

Managed Public Cloud Services for Large Accounts

This quadrant is relevant to large enterprises in the U.S. that are evaluating public cloud managed service providers (MSPs). In this quadrant report, ISG lays out the current market positioning of these providers in the U.S. and how they can address key challenges in large enterprises' infrastructure management in the public cloud environment. These providers manage client workloads on third-party, public cloud, hyperscale environments so enterprises can focus on other tasks.

To be successful in the current digital business environment, enterprises must take a unified approach to their technical infrastructure across public and private clouds. ISG sees that enterprises in the U.S. are leading the charge when it comes to cloud adoption, though their overseas counterparts are not far behind.

Using public cloud managed services can help enterprises implement cloud-native solutions leveraging containers and serverless functions. This helps enterprises achieve application modernization and cost optimization to run their applications at scale.

Enterprises will get the benefit of the MSPs' automation and AI capabilities to monitor their infrastructure to predict the failures and dependency of services in case of failures to reduce maintenance costs. ISG sees that the COVID-19 crisis has created an increased demand for enterprises to focus more on business continuity and disaster recovery in their public cloud managed services.

IT leaders should read this report to better understand the relative strengths and weaknesses of managed service providers, as well as how the MSPs' approaches to the

market can impact enterprise public cloud strategies, improve business agility and reduce total cost of ownership.

Software development and technology leaders should read this report to understand the positioning of managed service providers and learn how MSP offerings can impact the ongoing development of an enterprise's software products.

Sourcing, procurement, and vendor management professionals should read this report to develop a better sense of the current landscape of managed service providers in the U.S.

MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Definition

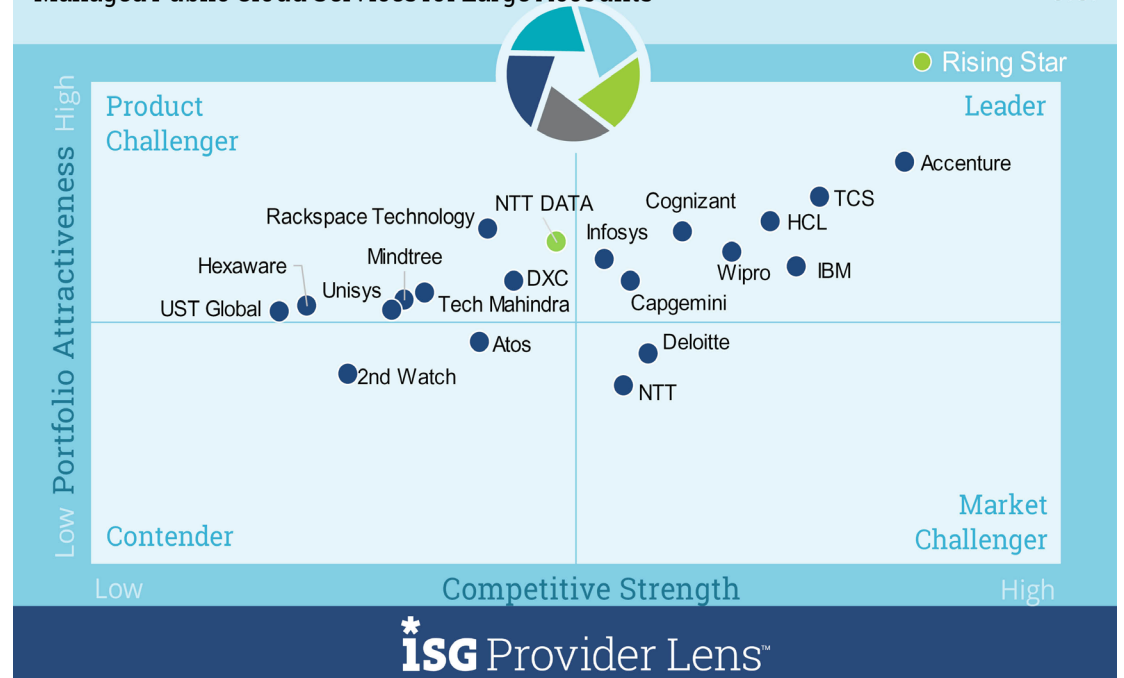
Public cloud managed services providers (MSPs) offer professional and managed services atop third-party public cloud IaaS and PaaS hyperscale platforms. Broadly, these services include provisioning, real-time and predictive analysis and monitoring, and operational management of a customer's public and multi-cloud environment, with the aim of maximizing the performance of workloads in the cloud, reducing costs, and ensuring compliance and security. Typically, MSPs offer specially developed or licensed cloud management platforms and tools to serve customers with optimal automation and provide the necessary transparency on the managed cloud resource pool in terms of capacity utilization and costs, including self-service administration.

Services provided typically include:

- Management and monitoring of services around CPU, storage, memory, databases, and operations of microservices, virtual machines and containers.

Public Cloud – Solutions and Services
Managed Public Cloud Services for Large Accounts

2020
U.S.



Source: ISG Research 2020

MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Definition

- Operation system, middleware and application upgrade services.
- Service portal for expense management (chargeback and showback) and identity management or IT service management.
- Governance and compliance management.
- Support services such as incident management, configuration, security services and automation setup.

Eligibility Criteria

- Operational excellence and well-defined professional services.
- Experience in building and managing public and multi-cloud environments.
- Expertise in managing configurations of platforms and systems as well as that of containers.
- Support for software code development and for cloud-native and legacy system integration.
- DevOps, API-enabled automation and cloud analytics experience.
- Mature security processes.
- Support for different client roles such as IT technicians and developers.
- Partnerships with relevant public cloud providers and managed service provider (MSP) certificates for AWS, Azure, GCP or others.

MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Observations

The managed public cloud ecosystem has been growing at a faster rate as overall cloud adoption rises. Enterprises need a helping hand in managing hybrid and multi-cloud infrastructure that is growing ever more complex. The focus is mainly on cost optimization and moving enterprise resources to core activities rather than cloud infrastructure management. Also, as the world adapts to working from home, it has become imperative for enterprises to outsource their cloud management and focus on building and innovating new solutions for their clients. Service providers are using DevOps and infrastructure-as-code (IaC) practices as well as out-of-the box API integration capabilities to manage cloud infrastructures efficiently. Automation is still a big part of cloud operations management and is being leveraged along with intelligent DevOps practice for remediation and self-healing capabilities that offer better user experience.

Many large enterprise customers have already started to use two or more hyperscalers for different applications, and ISG believes that this trend is going to scale up considerably. But there is a downside to this setup. Several large enterprises have mentioned that they find infrastructure orchestration has become difficult because of the several moving parts and the complexity of managing a hybrid multi-cloud environment. To help counter this problem, several service providers and vendors have developed robust cloud management platforms (CMPs), and enterprises are now adopting and using these tools to make their lives easier. Other challenges that enterprises should be aware of with a multi-cloud environment include vendor lock-in by the public cloud provider and the need for interoperability between two or more public cloud providers.

In this quadrant, we evaluated 20 providers evaluated and featured. We identified eight Leaders and one Rising Star.

- **Accenture** has the maximum number of hyperscaler competencies for the public cloud managed services. The firm leverages its myWizard® platform for automating the enterprise cloud landscape.

MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Observations (cont.)

- **Capgemini** provides public cloud managed services through its Capgemini Cloud Platform (CCP) offering. It has a robust infrastructure-as-code capability to accelerate the deployment and offers high-quality cloud security.
- **Cognizant's** robust managed services leverage cloud-native platforms, and it offers an infrastructure-as-code practice to automate the migration process. Cognizant provides multi-cloud management through its popular cloud management platform, Cloud360.
- **HCL's** DRYICE iAutomate platform helps enterprises automate their cloud operations. Its robust cloud management platform, MyCloud, has rapidly evolved over the years.
- **IBM** has a strong public cloud managed services presence in the U.S. The company has developed many industry-specific solutions and has an integrated end-to-end service portfolio for multi-cloud environments.
- **Infosys** has an aggressive go-to-market strategy and is involving its top management members in acquiring new clients for its public cloud service. The company has committed to increase its U.S.-based employee count by hiring local talent.
- **TCS** offers public cloud managed services through its catalog-based service portfolio and uses automation blueprints and frameworks that it has built over the years to help clients managed their multi-cloud environments. In addition, it has one of the largest staffs of cloud-certified employees in the U.S.
- **Wipro** delivers its public cloud managed services through its BoundaryLess Enterprise (BLE) solution, and the majority of its client base is in the U.S. The firm also has strong automation capabilities and leverages tools through its wide partner network.
- **NTT DATA** is a Rising Star with a growing portfolio of public cloud managed services that focus on container management and strong automation capabilities.

ENTERPRISE CONTEXT

Managed Public Cloud Services for Midmarket

This quadrant is relevant to mid-sized enterprises in the U.S. that are evaluating public cloud managed service providers (MSPs). In this quadrant report, ISG lays out the current market positioning of these providers in the U.S., and how they can address key challenges in mid-sized enterprises' infrastructure management in the public cloud. These providers manage client workloads on third-party, public cloud, hyperscale environments so enterprises can focus on other tasks.

To be successful in the current digital business environment, enterprises must take a unified approach to their technical infrastructure across public and private clouds. ISG sees that enterprises in the U.S. are leading the charge when it comes to cloud adoption, though their overseas counterparts are not far behind. The mid-sized enterprises have fewer complex requirements and smaller-scale projects than large enterprises, and they prefer providers with strong niche offerings with competitive pricing and high integration capabilities.

Using public cloud managed services can help enterprises implement cloud-native solutions leveraging containers and serverless functions. This helps enterprises achieve application modernization and cost optimization to run their applications at scale.

Enterprises will get the benefit of the MSPs' automation and AI capabilities to monitor their infrastructure to predict the failures and dependency of services in case of failures to reduce maintenance costs. ISG sees that the COVID19 crisis has created an increased demand for enterprises to focus more on their business continuity and disaster recovery in their public cloud managed services.

IT leaders should read this report to better understand the relative strengths and weaknesses of managed service providers, as well as how the MSPs' approaches to the market can impact enterprise public cloud strategies, improve business agility and reduce total cost of ownership.

Software development and technology leaders should read this report to understand the positioning of managed service providers and learn how MSP offerings can impact the ongoing development of an enterprise's software products.

Sourcing, procurement, and vendor management professionals should read this report to develop a better sense of the current landscape of managed service providers in the U.S.

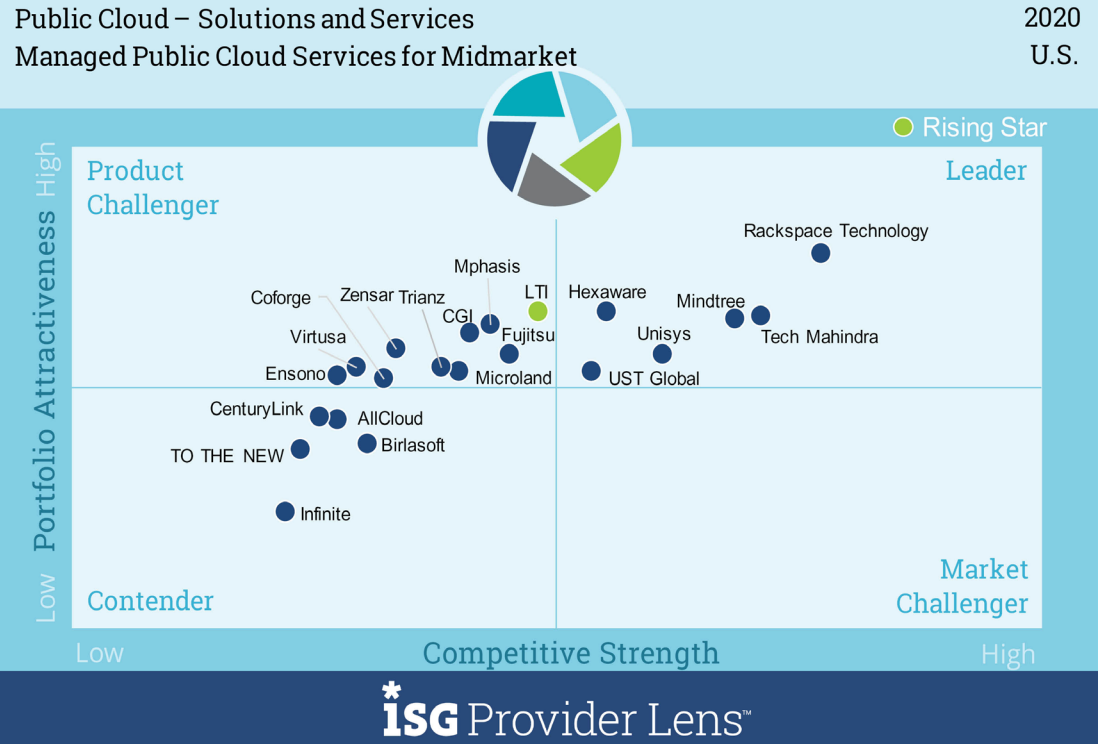
MANAGED PUBLIC CLOUD SERVICES FOR MIDMARKET

Definition

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Services provided typically include:

- Management and monitoring of services around CPU, storage, memory, databases, and operations of microservices, virtual machines and containers.



Source: ISG Research 2020

MANAGED PUBLIC CLOUD SERVICES FOR MIDMARKET

Definition (cont.)

- Operation system, middleware and application upgrade services.
- Service portal for expense management (chargeback and showback) and identity management or IT service management.
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- Support services such as incident management, configuration, security services and automation setup.

Eligibility Criteria

- Operational excellence and well-defined professional services.
- Experience in building and managing public and multi-cloud environments.
- Expertise in managing configurations of platforms and systems as well as that of containers.
- Support for software code development and cloud-native and legacy system integration.
- DevOps, API-enabled automation and cloud analytics experience.
- Mature security processes.
- Support for different client roles such as IT technicians and developers.
- Partnerships with relevant public cloud providers and managed service provider (MSP) certificates for AWS, Azure, GCP or others.

MANAGED PUBLIC CLOUD SERVICES FOR MIDMARKET

Observations

In the midmarket segment, service providers have focused on customer delight, and they go above and beyond to please enterprise customers. Most enterprise customers have already started to use two or more hyperscalers for different applications, and ISG believes that this trend is going to scale up considerably. Several service providers and vendors have developed robust Cloud Management Platforms (CMPs) to help enterprises manage their complex multi-cloud environments. Other challenges that enterprises should be aware of with a multi-cloud environment include vendor lock-in by the public cloud provider and the need for interoperability between two or more public cloud providers. Enterprises here focus mainly on cost optimization and moving enterprise resources to core activities. In addition, as the world adapts to working from home, enterprises are looking for outsourcing partners for cloud management and focus on building and innovating new solutions for them. Service providers use DevOps and infrastructure-as-code (IaC) practices as well as out-of-the box API integration capabilities to manage cloud infrastructures

efficiently. Automation is still a big part of cloud operations management and is being leveraged along with intelligent DevOps practice for remediation and self-healing capabilities that offer better user experience.

In this quadrant, we evaluated 21 providers, out of which we identified six Leaders and one Rising Star.

- **Hexaware's** Amaze for Manage™ platform helps clients manage their hybrid and multi-cloud environments by using infrastructure as code to automate and provision cloud infrastructure. Also, Hexaware's Amaze™ suite is being used by more than 70 percent of its clients.
- **Mindtree** offers robust end-to-end managed public cloud services with its in-house MWatch platform. The firm combines Microsoft Azure expertise with significant managed services experience on the platform.
- **Rackspace Technology** offers customer support with its Fanatical Experience™ services, which is an industry-leading practice. The company has a robust partner ecosystem and offers infrastructure as code for ongoing operations.
- **Tech Mahindra** offers a robust cloud management platform, mPAC 3.0, which is integrated with its AIOps platform, TACTiX, to enhance automation capabilities.

MANAGED PUBLIC CLOUD SERVICES FOR MIDMARKET

Observations (cont)

- **Unisys** offers public cloud managed services through CloudForte. The company has several public sector clients in the U.S. geography.
- **UST Global** offers Multicloud Manager, a comprehensive cloud management platform that can integrate and run complex workloads distributed in a multi-cloud environment.
- **LTI** is a Rising Star with a growing portfolio of public cloud managed services offerings. Its Cloud Brokerage Platform provides continuous support for application management, and has support functions for DevOps.



UNISYS

Overview

Unisys is a global information technology company headquartered in Pennsylvania. It offers public cloud managed services through its CloudForte solution. Unisys has achieved Expert Managed Services Partner certification from both Microsoft Azure and AWS. Unisys has many clients in federal, state and local government agencies. It also focuses on the banking, financial services and insurance and energy verticals.

Strengths

Secure management: Unisys helps enterprises in highly regulated industries design a hybrid cloud solution that isolates workloads to benefit from both a lower-cost IaaS approach and the highest compliance requirements for privacy, data location and security. It is capable of supporting the strict regulations in the federal and government sector along with banking, insurance and health industries.

Robust CloudForte solution: The company's popular cloud management platform, CloudForte, has been the choice of many enterprises. Along with taking advantage of it for automated management and operations of applications, they also use it for migrating workloads to the cloud. The platform has improved its portfolio by adding AIOps capabilities, accelerators and navigators for rapid business outcomes.

Strong public sector presence: Unisys has expertise in providing secured and controlled cloud environments to large government organizations. In addition to its long service to U.S. state and federal clients, the company has experience in serving state-owned companies, public communities, public administrations and government agencies that require quick support, close proximity and high availability.

Caution

Compared to its competitors, Unisys still has a small portfolio and few engagements around DevSecOps. It has plans to improve its DevSecOps capabilities to better serve its enterprise clients with embedded security and compliance governance capabilities.



2020 ISG Provider Lens™ Leader

Unisys' comprehensive approach to managed public cloud services provides a safe path to enterprises and public sector clients as they move to the cloud.

ENTERPRISE CONTEXT

SAP HANA Infrastructure Services

This report is relevant to enterprises across industries in the U.S. and will help them evaluate providers of SAP HANA infrastructure services for SAP S/4HANA workloads and large-scale HANA databases. In this quadrant report, ISG highlights the current market positioning of these providers in the U.S., based on the depth of service offering and market presence.

Enterprises face challenges in maintaining their own IT infrastructure specific to the SAP product line owing to factors such as high costs, difficulties in data management and change management, and a shortage of talent or skills. However, many enterprises have implemented or are implementing SAP HANA as a part of their digital transformation initiatives, and they are choosing a hyperscale provider to overcome the challenges and address talent/skill gaps. This report can help with choosing the right hyperscale provider to migrate their SAP workloads.

Enterprises leverage hyperscalers' compute resources, storage and connectivity in a public cloud to host SAP workloads and facilitate scaling based on usage and infrastructure operations. Along with the infrastructure, enterprises can also take advantage of providers' expertise in data migration, system imaging, backup, restore, disaster recovery, resource usage, monitoring and management dashboards.

ISG sees that enterprises in the U.S. have started to adopt SAP HANA in their business processes. These enterprises have specific IT infrastructure needs such as scalability and adaptability of HANA-based workloads and integration with third-party tools. Also, enterprises expect to achieve an optimal IT infrastructure and SAP security in their transformation.

IT leaders should read this report to better understand the relative strengths and weaknesses of SAP HANA infrastructure service providers and learn how these providers' approaches to the market can impact enterprise public cloud strategies.

Software development and technology leaders should read this report to understand the relative positioning and capabilities of hyperscale SAP HANA infrastructure providers, which can help them to procure infrastructure and services to migrate their workloads to public cloud platforms.

Sourcing, procurement, and vendor management professionals should read this report to develop a better sense of the current landscape of SAP HANA infrastructure service providers in the U.S.

SAP HANA INFRASTRUCTURE SERVICES

Definition

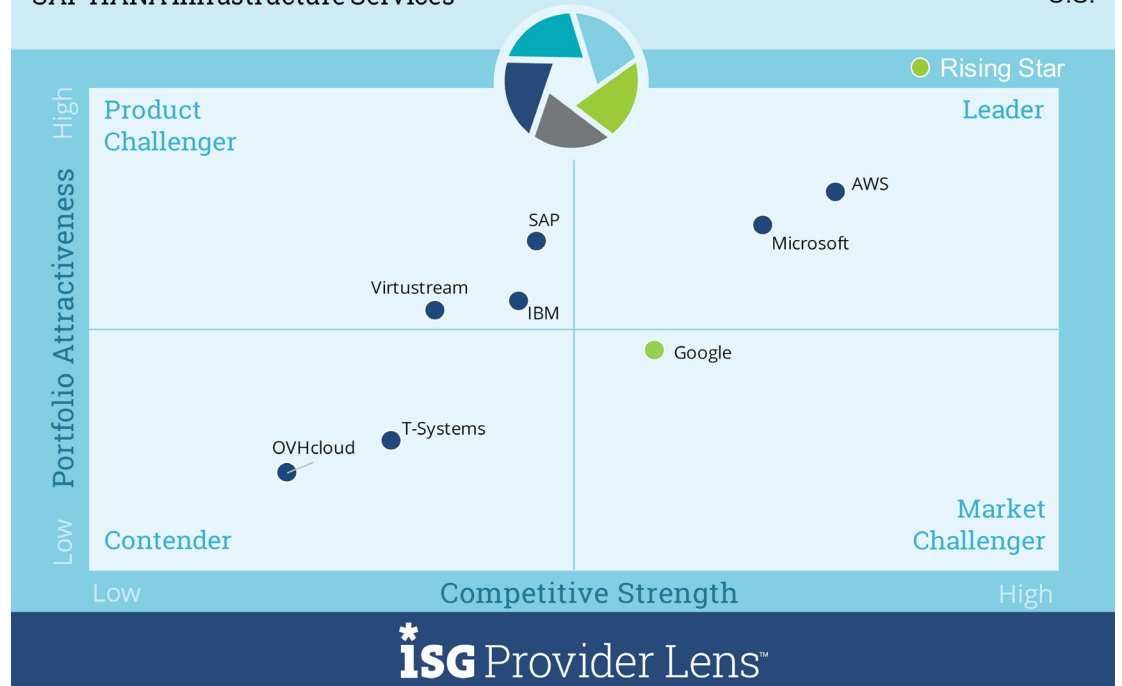
This quadrant examines cloud infrastructures best suited to host the SAP software portfolio, with emphasis on SAP S/4HANA workloads and large-scale HANA databases. Participating vendors offer infrastructure as a service (hyperscale IaaS), including infrastructure operations, facilities, provisioning and scaling capacity, on a pay-as-you-go model.

IaaS tools should include data migration, system imaging, backup, restore, disaster recovery, resource usage monitoring and management dashboards. Tools can be part of the standard IaaS offering or be provided by partners in a marketplace.

The participating vendor should provide presales support to help clients on the migration plan, cloud architecture, sizing and performance optimization, licensing, systems and database configuration, virtual private network configuration, and third-party vendor solutions (toolset). The support analysis focuses on the vendor's service partner ecosystem's ability to conduct related migrations and operations. S/4HANA hosting, colocation and enterprise cloud are excluded.

Public Cloud – Solutions and Services
SAP HANA Infrastructure Services

2020
U.S.



Source: ISG Research 2020

SAP HANA INFRASTRUCTURE SERVICES

Eligibility Criteria

- IaaS includes servers, storage and connectivity specific to the SAP product line.
- Memory capacity should be above 6 terabytes.
- Should offer an SAP IaaS certified platform.
- Vendor must have direct operations or at least one authorized partner responsible for client relationship and local regulations compliance, regardless of the data center location.

Observations

Hosting SAP HANA on public cloud infrastructure requires knowledge of the complexities involved in the migration process and then in operations. Providers must have a clear strategy and structured approach to handling SAP S/4HANA workloads and large-scale HANA databases. Leading cloud infrastructure providers of HANA services are coping up with fast-paced market developments, which include many ancillary cloud services. Such services include supporting infrastructure for other SAP offerings, cost analysis and related operational analysis, provisioning and setup of the technical infrastructure, and go-live and operations support. Deployment normally requires close cooperation with SAP for compliance with related standards

In this quadrant, ISG evaluated eight providers, and we identified two Leaders and one Rising Star.

SAP HANA INFRASTRUCTURE SERVICES

Observations (cont.)

- **AWS** dominates the market with its wide range of services to host SAP HANA workloads on its platform. AWS also has the highest number of partners and has a specialized SAP competency certification program, which no other cloud provider offers.
- **Microsoft** and **SAP** have a long-standing relationship. They have developed solutions that can seamlessly integrate the Microsoft product and solution ecosystem with SAP products and services. It offers smooth integration to more than 200 applications through its Logic Apps connector for SAP ECC and SAP S/4HANA.
- **Google** Cloud Platform is identified as a Rising Star due to its commitment to growing infrastructure for hosting SAP workloads. It offers support for legacy SAP applications and has developed a rapid migration program with the help of its partners by leveraging automation tools and frameworks.



ENTERPRISE CONTEXT

Hyperscale Infrastructure and Platform Services

This report is relevant to enterprises across industries in the U.S. and will help them evaluate providers of hyperscale infrastructure and platform services. In this quadrant report, ISG highlights the current market positioning of these providers in the U.S. and the way they address the key challenges that confront enterprise clients in the country.

Enterprises face challenges in maintaining their own IT infrastructure due to higher costs. Hence, the adoption of public cloud services across industries is on the rise and enterprises prefer a multi-cloud setup when migrating their workloads to the cloud. In 2020, the urge to move workloads to public cloud has become more pressing than ever and many enterprises are accelerating their migration journey. This report can help with choosing the right hyperscale platform to migrate their workloads.

Enterprises can benefit from investing in infrastructure and platform services that can manage their infrastructure with regular (end-to-end) updates and help in enhancing processes and ensuring operational efficiency.

In addition, they can leverage hyperscalers' compute resources, middleware and software in a public cloud in a virtual or containerized software-defined environment and serverless architectures. Along with the infrastructure, enterprises can also take advantage of platform as a service (PaaS) services that includes persistent resources, business process management, collaboration networks, databases, analytics and machine learning (ML) capabilities.

ISG sees that enterprises in the U.S. have started migrating critical workloads to public cloud platforms as a part of their digital journey. The increase in public cloud adoption is due to factors such as improved data security and increased use of containerization and microservices technologies for application development and deployment.

IT leaders should read this report to better understand the relative strengths and weaknesses of hyperscale infrastructure and platform service providers, as well as learn how these providers' approaches to the market can impact enterprise public cloud strategies, reduce total cost of ownership, and improve business agility, scalability and flexibility.

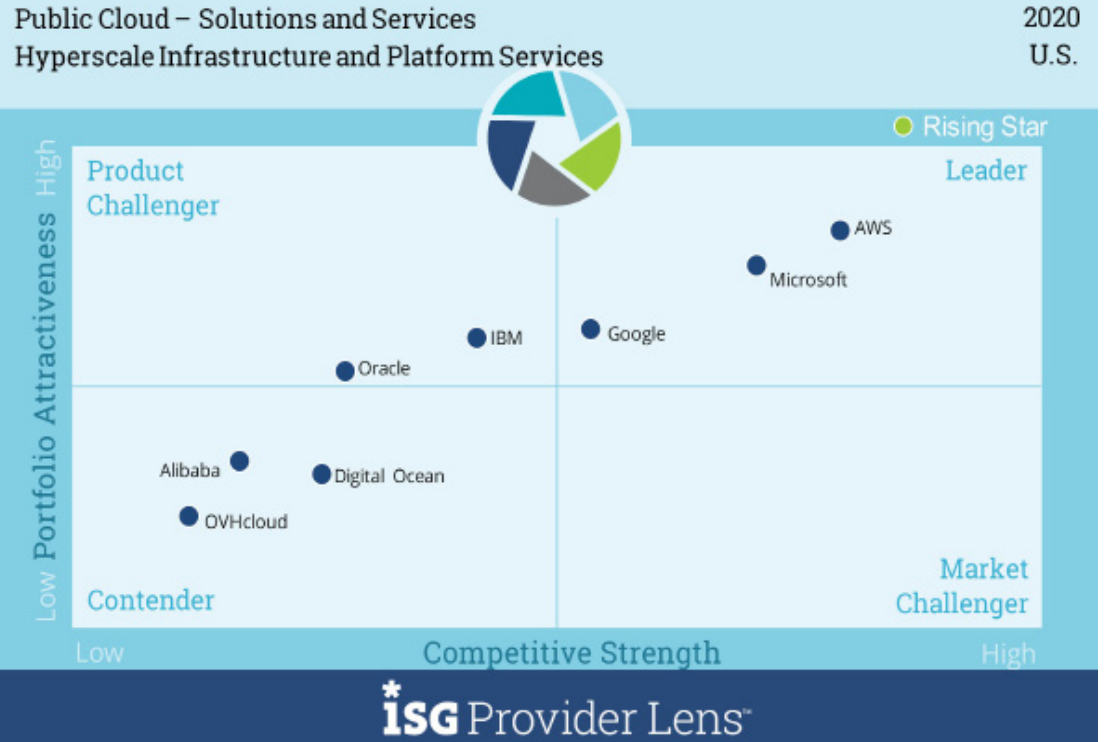
Software development and technology leaders should read this report to understand the relative positioning and capabilities of hyperscalers, which can help them procure infrastructure and platform services to migrate their workloads to public cloud platforms.

Sourcing, procurement, and vendor management professionals should read this report to develop a better sense of the current landscape of hyperscale infrastructure and platform service providers in the U.S.

HYPERSCALE INFRASTRUCTURE AND PLATFORM SERVICES

Definition

This quadrant is aimed at suppliers that provide virtual compute resources, middleware and software on a public cloud. Clients consume infrastructure and platform (micro)services as an on-demand and a web-centric service. Typical services in the IaaS segment are compute services, storage and network resources, where all are provided in virtual or containerized software-defined fashion and rounded up by serverless architectures. The hyperscaler PaaS segment offers multiple microservices and runtime engines for predefined cloud-based application development processes that typically address the full lifecycle needs for a developer who is building or modernizing applications. Services include middleware, persistent resources, business process management, collaboration networks, databases, analytics and machine learning (ML) capabilities. Internal and external (third-party) services are also being made available through marketplaces. In addition, IaaS or PaaS vendors support and manage ISVs in their go-to-market activities.



Source: ISG Research 2020

HYPERSCALE INFRASTRUCTURE AND PLATFORM SERVICES

Eligibility Criteria

- Innovative portfolio of infrastructure services (computing power, memory, network, backup, etc.) and container management functions.
- Powerful and resilient data-center infrastructure.
- Easy access, transparent prices, dynamic (consumption-based) and fixed (reserved) billing models.
- Recognized standards and certifications, strong focus on data protection, and a sophisticated cybersecurity approach.
- Support for infrastructure as code and serverless computing in combination with highly automated provisioning, event triggering and failover.
- Test and development environments, including workflows and log/report functionality for rollouts.
- Support for multiple development tools, operating systems, technologies and platform management automations.
- Workflow support for Agile development methodologies (Scrum).
- Open architecture, interoperability and well-documented (web service) APIs or middleware/integration layer to join multiple clouds or services and platforms.
- Specialized partner program with a broad partner ecosystem to support local customer requirements.

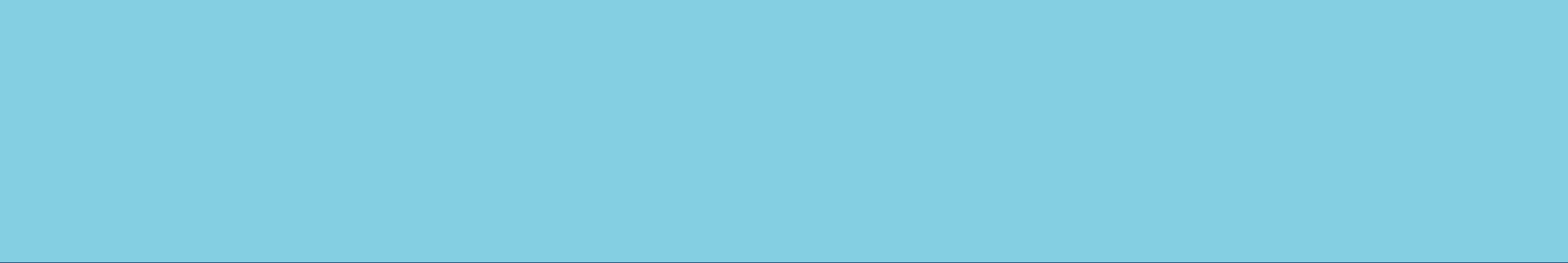
HYPERSCALE INFRASTRUCTURE AND PLATFORM SERVICES

Observations

AWS has a first-mover advantage because it has been entrenched in the public cloud infrastructure domain for over a decade. Microsoft Azure offerings are now getting more traction, especially with large enterprises that have legacy Microsoft dependencies such as Office 365 and Windows integration, which makes Azure a popular choice. Azure is catching up fast and is closer to AWS than ever before. Google, too, is catching up and has increased its market reach as several customers prefer GCP for specific use cases such as analytics, big data, and large compute- and graphics-intensive workloads.

In this quadrant, ISG evaluated eight providers, from which we identified three Leaders.

- **AWS** continues to dominate the IaaS and PaaS market through continuous innovation and increasing its ever-growing portfolio of products and services. It continues to invest in AI/ML technologies and develop several industry-specific solutions.
- **Google Cloud Platform** has an aggressive client acquisition strategy and continues to get closer to AWS and Microsoft Azure. It provides seamless cloud-native integration and specializes in offering infrastructure for enterprises that have compute- and graphics-intensive workloads.
- **Microsoft Azure's** recent Department of Defense cloud deal (JEDI contract) has helped it prove its strong IaaS solutions for the public sector. Also, it continues to leverage its existing strong relationships with partners and enterprise customers to grow its business and offers them deep discounts to leverage Microsoft Azure services for an overall Microsoft integrated cloud experience.



Methodology

METHODOLOGY

The research study “ISG Provider Lens™ 2020 – Public Cloud - Solutions & Services” analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of Public Cloud - Solutions & Services market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
 - Strategy & vision
 - Innovation
 - Brand awareness and presence in the market
 - Sales and partner landscape
 - Breadth and depth of portfolio of services offered
 - Technology advancements



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Shashank Rajmane has more than a decade of extensive research experience and has led the ISG Provider Lens™ studies — Public Cloud Consulting & Transformation and Private/Hybrid Cloud & Data Center Outsourcing Services. He leads the efforts for the U.S. geography along with global geography reports. Apart from this, Shashank has been part of many consulting engagements and helps ISG's enterprise clients select the right service providers and vendors based on their IT buying requirements. He is also responsible for authoring thought leadership papers, briefing notes, blogs and service provider intelligence reports, especially in the next-generation cloud and infrastructure services domain. He has also authored several research papers on best practices for choosing cloud vendors and cloud management platforms, along with writing a few whitepapers on the cloud industry.



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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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