

***ISG** Provider Lens™

Public Cloud - Solutions & Services

Managed Public Cloud Services for
Midmarket

USA 2020

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:



November 2020

About this Report

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

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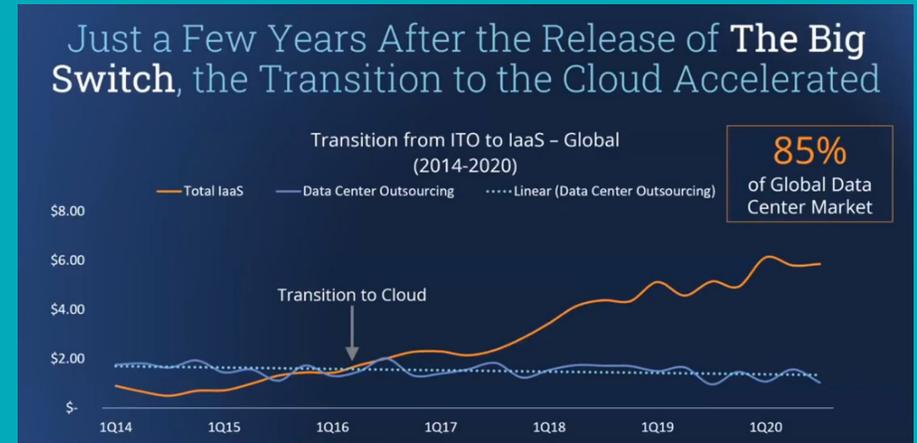


EXECUTIVE SUMMARY

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

Managed Public Cloud Services for Midmarket

This quadrant is relevant to midsized 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 midsized 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 midsized 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

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 are used 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 Midmarket
 2020
 U.S.



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.
- 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 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.



HEXAWARE

Overview

Hexaware is a global service provider delivering automation-led IT services, business process outsourcing and consulting services. The company leverages its Amaze™ suite, which contains automation tools and platforms for delivering public cloud managed services. In the U.S., Hexaware is strongly focused on the banking, financial services and insurance, healthcare and pharmaceutical sectors.

Strengths

Comprehensive managed services: Hexaware leverages its Cloud Operate division through its Amaze for Manage™ platform to manage hybrid and multi-cloud environments in a cost-effective and secure manner. This platform seamlessly integrates with existing infrastructure, helps optimize it, and offers management of traditional infrastructure services, automation-enabled self-service, security, financial management, and multi-cloud operations. The platform also leverages AI and ML technologies to provide predictive analysis and recommendations to resolve incidents with lower MTTR.

IaC focused management: As a part of its DevOps approach for managing cloud infrastructure, Hexaware uses infrastructure as code by default and leverages its over 200 templates (CloudFormation, ARM and Terraform) to automate the provisioning of infrastructure and enable clients to develop, deploy, and scale resources in multi-cloud environments. Hexaware can handle large workloads with very few resources because of its high levels of automation and cloud reliability. Clients benefit by having an automated process for cloud infrastructure management.

Outcome-based pricing structure: One out of every three cloud engagements of Hexaware are charged based on the outcome defined at the start of the engagement, which often provides cost savings to the customer. Hexaware has managed to deliver significant cost efficiencies to its enterprise clients through its cloud financial management module, where it charges the client based on the percentage of cost savings it manages to achieve for them.

Caution

Although Hexaware has recently been recognized as a Microsoft Azure Expert MSP, it still needs to acquire MSP certification from AWS and GCP. The company mentioned that it they are in process of receiving an MSP certification from AWS.



2020 ISG Provider Lens™ Leader

Hexaware is an ideal partner for enterprises that are looking for a flexible, zealous managed services provider that goes above and beyond to offer customer delight.



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



Authors and Editors



Shashank Rajmane, Lead Author

Lead Analyst

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.



Jan Erik Aase, Editor

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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.

Authors and Editors



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Prakash N is a senior analyst at ISG and is responsible for supporting ISG Provider Lens™ studies on Private/Hybrid Cloud, Public Cloud, and Cloud Native - Container Services. His areas of expertise are cloud, data center, public cloud platforms, and cloud native services. During his tenure, he has developed research content for ISG Provider Lens™ in the areas of Private Cloud, Cloud Native Services, and Public Cloud. He is responsible for supporting research, authoring blogs, enterprise content, and the global summary report with market trends and insights.

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