ISG Provider Lens™

2021

Container Services & Solutions 2021

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ISG (Information Services Group) (NASDAQ: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including 75 of the top 100 enterprises in the world, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; technology strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006 and based in Stamford, Conn., ISG employs more than 1,300 professionals operating in more than 20 countries — a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.

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Definition

In the past decade, new patterns and technologies have emerged for the development, deployment and operation of modern applications that take advantage of the capabilities available in modern infrastructure environments. This cloud-native approach focuses on building applications that are highly modular, adaptable, fault-tolerant and better capable of delivering value to end users. By decoupling applications from the underlying infrastructure, container solutions offer some major advantages over traditional on-premises applications, which include light-touch updating of applications, faster scaling of compute and other resources to accommodate peaks in demand, the freedom to work in web-based programming languages, easier development of new applications, and minimal downtime. Kubernetes, an open-source container orchestration system created by Google and maintained by a massive community of technologists, aids in this approach.

Depending on their maturity and preferences, enterprises take a variety of approaches to adopting containers within their technology estate. Some choose to work with managed service providers and system integrators that offer managed container services, backed by skilled employees who can help configure entire platforms for cloud-native applications, migrate legacy workloads to containers and build new applications for enterprises to run on the platform. While some others opt to directly procure container management capabilities, either by turning to independent software vendors for packaged Kubernetes platforms, or using the hyperscale cloud providers' container services offerings as the foundation for their future. To achieve the greatest value from Kubernetes, many companies work with training partners to help level up their employees' technical skills and address the needs of this new model of application development.

No matter what model they choose for adopting containers, these enterprises seek clear business benefits from the adoption of this new technology. Some of these benefits include lower operational costs and capital expenditure; better customer experience through faster development of new products and services; reduced service disruption; and better ways to harvest and analyze data.

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

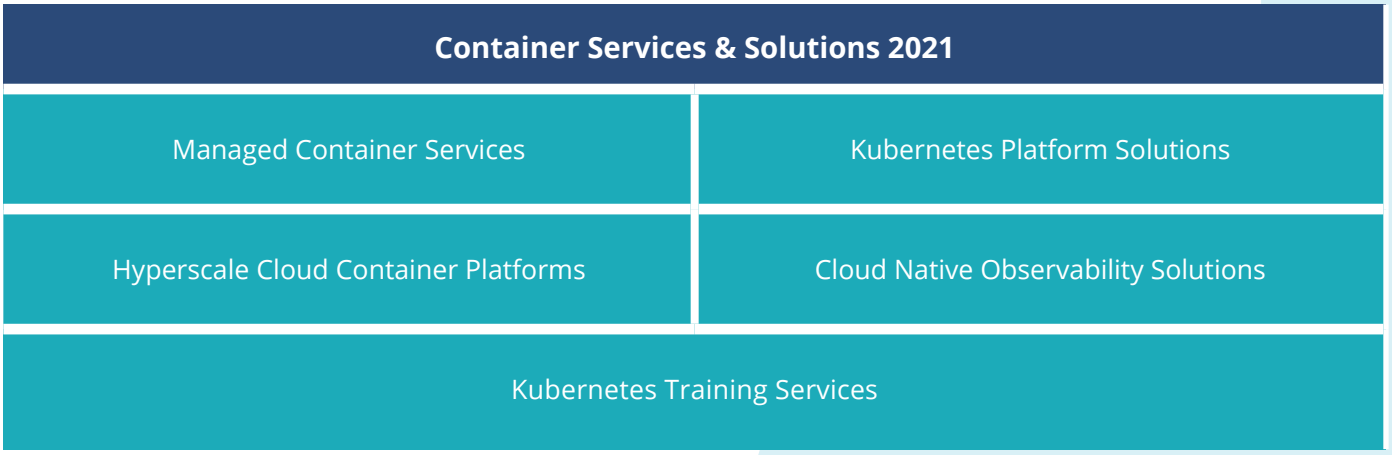
- Transparency on the strengths and weaknesses of relevant providers;
- A differentiated positioning of providers by segments;
- A view of the global services market with a focus on the U.S. and Europe.

Our study serves as the basis for important decision-making for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential new engagements.

Quadrants Research

As part of this ISG Provider Lens™ quadrant study, we are introducing the following five quadrants on Container Services & Solutions:

Simplified illustration



Source: ISG 2021

Managed Container Services

This quadrant analyzes service providers that offer a suite of capabilities to enterprises that assist them with the creation and operation of container platforms, along with the development of applications atop those platforms. Furthermore, service providers must be equipped with a structured methodology to help enterprises containerize existing applications. These offerings should focus on assisting enterprises with setting up Kubernetes, service mesh, observability and security functionality, backed by skilled employees who are experts in this field of emerging technology.

(Note: This quadrant encompasses the service provider evaluation components of last year's Managed Kubernetes, Managed Service Mesh and Managed Cloud Native Security quadrants.)

Eligibility criteria:

- Robust tooling that augments and streamlines the process of operating a container platform for an enterprise, with capabilities tailored to complex business and environments;
- Strong local employee expertise in deploying and operating container platforms, along with building and supporting applications that run on these platforms;
- A path to integrate legacy workloads with a modern container platform, which are either running in separate virtual machines or on the container platform itself;
- Strong understanding of local compliance and regulatory requirements;
- Service structure that prioritizes business benefits to clients from the use of container services;
- Relevant certifications for Kubernetes, including the Cloud Native Computing Foundation's Kubernetes Certified Service Provider.

Kubernetes Platform Solutions

This quadrant is focused on independent software vendors that offer enterprise software distributions of Kubernetes. These distributions should be based on the upstream open-source project and provide additional capabilities necessary for enterprises to maximize their Kubernetes use such as multi-cluster management, compliance management and patching. This software should be able to run under a hybrid cloud model.

Eligibility criteria:

- Unique capabilities that aid enterprises in developing and adopting Kubernetes, with special consideration for machine learning (ML) and edge computing use cases;
- Technical support capabilities that assist enterprises with the adoption and management of platform solutions;
- Support for hybrid and multi-cloud operations;
- Clear business benefits tied to use of the Kubernetes platform solution;
- Relevant certifications for platforms, including the Cloud Native Computing Foundation's Certified Kubernetes Distribution.

Hyperscale Cloud Container Platforms

This quadrant is focused on hyperscale cloud providers that offer managed public cloud platforms for containerized applications. Players in this space own globally distributed infrastructure with datacenter regions available in the relevant geographies for this study. They also offer fully automated managed services dedicated to deploying and operating Kubernetes on this infrastructure on clients' behalf.

Eligibility criteria:

- Fully managed platforms that automate the deployment of Kubernetes clusters on provider's public cloud infrastructure;
- Relevant additional services for supporting Kubernetes operations on the platforms, including multi-cluster management, managed service mesh, observability and security;
- Integration with cloud platform services, with special consideration for ML, edge computing and hybrid cloud use scenarios;
- Hyperscale cloud infrastructure with container services available from multiple data centers within relevant regions, along with robust enterprise support capabilities in these regions.

Cloud Native Observability Solutions

This quadrant is focused on software vendors that provide dedicated solutions for observability (logging, tracing and measurement) of containerized applications. Understanding the behavior of these applications can be more complex when compared to a traditional monolith. Developers and operators must understand the behavior of each containerized app or service as well as how they communicate with one another. Using standard monitoring tools that have been built without considering cloud native applications could fail to provide necessary information to enterprises. Thus, enterprises need to opt for specialized capabilities.

Eligibility criteria:

- Software that provides novel capabilities to help enterprises understand the inner workings and performance of their containerized application environments;
- Dedicated tools meant for observability, specifically multi-container applications, with support for highly granular microservices architecture, as well as for applications that comprise a smaller number of complex services;
- Capability to work across multiple infrastructure environments under a hybrid cloud model;
- Resources to help enterprises understand and implement the software within their environment;
- Strong connection between the solution's business model and enterprise outcomes (e.g., financial and performance benefits).

Kubernetes Training Services

This quadrant focuses on companies that offer bespoke training in the skills needed to safely deploy, scale and manage containerized applications and Kubernetes. Typically, these companies are certified by the Cloud Native Computing Foundation for training purposes. As new technical skills and cultural changes within an enterprise are required to effectively use Kubernetes, some businesses may opt to work with external training providers. In order to excel, providers in this category focus on driving business results on their clients' behalf.

Eligibility criteria:

- Availability of training materials in relevant languages for a provider's given region (English, French, German, Spanish, etc., as appropriate);
- Support for asynchronous and synchronous training, with a focus on integrating with enterprises' preferred models;
- Business and training structure focused on driving business benefits for enterprise training clients;
- Relevant certifications on an organizational and individual level.

Quadrants by Region

Quadrants	Global	U.S.	Europe
Managed Container Services	Overview	√	√
Kubernetes Platform Solutions	Overview	√	√
Hyperscale Cloud Container Platforms	Overview	√	√
Cloud Native Observability Solutions	Overview	√	√
Kubernetes Training Services	Overview	√	√

Schedule

The research phase falls in the period **June 2021 to July 2021**. During this period, survey, evaluation, analysis and validation will take place. The results will be presented to the media in **September 2021**.

Milestones	Beginning	End
Launch	May 20, 2021	
Survey Phase	May 20, 2021	June 24, 2021
Sneak preview	July 27, 2021	
Press release	Sept 8, 2021	

Please refer to the link below to view/download the Provider Lens™ 2021 research agenda: Annual Plan

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

Partial list of companies being invited for the survey

Are you in the list or do you see your company as relevant provider that is missing in the list? Then feel free to contact us to ensure your active participation in the research phase.

99Cloud

Accenture

Acornsoft

Alerant

Alibaba Cloud

Alterway

Altoros

Aluda

Amazon Web Services (AWS)

Appdiction Studio

Appfleet

Appvia

Arctiq

Aspen Mesh

Atos

Baidu

Banzaicloud

BeOpenIT

BJSS

Boer Technology

Booz Allen Hamilton

BoxBoat

Caicloud

Camptocamp

Canonical

Capgemini

Centreon

Chaoskube

Checkmk

Chronosphere

CiINQ

Cisco

Citrix

City Academy

Claranet

Cloudera

Cloudical

CloudIQ

CloudOps

CloudYuga

Component Soft

Conoa

Container Solutions

Containous

Contino

Controlplane

Creationline

Cuegee

Cuemby

D2IQ

DaoCloud

Darumatic

Data Essential

Databricks Academy

DataDog

Datadrivers

DataStax

Deepshore

Dell

Deloitte

denodo

Desotech

Devoteam

DGi

Digital Ocean

DoiT

DXC Technology

Dynatrace

EasyStack

elastisys

Elastx

Engineer Better

Entigo

Epsagon

Ericsson

Fivetran

Flant

fluentd

Fuga Cloud

Fujitsu

Fullstaq

Giant Swarm

Google Cloud

Gopaddle

Gremlin

Guida

HarmonyCloud

HCL

High Plains Computing

Honeycomb

Host Presto

HPE

Huawei Cloud

Humio

Hyve

IBM

Icinga

Informatica

InfraCloud

inovex

Inspur

Instana (IBM)

inwinSTACK

Jaeger

Jelastic

Jetstack

Kamatera

Kasm

Kasten

kiratech

KodeKloud

Kong

Kubermatic

LeanIX

LightStep

Linux Foundation Training

Litmus

Loggly

Logz

Mantisnet

Microsoft Azure

Mirantis

Mobilise

Mphasis

Navitas

Nebulaworks

Netways

New Relic

Noris network

Novetta

Nutanix

OBSS

Occentus

OCTO Technology

OpenTelemetry

Opsdis

Oracle

Origoss Solutions

Oteemo

OVH Cloud

Padok

Particule

Persistent Systems

Platform9

Platformer

plusserver

Polar Squad

PowerfulSeal

Prodyna

Pulsant

Puzzle ITC

Rackner

Rackspace

Rancher (SUSE)

Rancher Labs

Red Hat Open Shift

Red Kubes

Redpill Linpro

Redploy

Replex

RX-M

SAP

ScaleUp Technologies

Scaleway

Servicememe

Servinga

SIGHUP

Slpoppio

SmartStream

softax

SoKUbe

SparkFabrik

Spectro Cloud

Spot

Stackpath

StackState

Stakater

Starburst

Steadybit

Storm Reply

Sumo Logic

SuSE

SVA

Sysdig

Talend

Tech Mahindra

Tencent Cloud

TenxCloud

Teutostack

The Scale Factory

Translucent Computing

UKFast

UST Global

VanillaCloud

Ventus Cloud

Virtuozzo

VMware

Volcano Engine

Vultr

Weave Cloud

Weave Scope

Weaveworks

WhizUS

Wipro

x-cellent

XenonStack

YLD

Zabbix

City Network

eficode

Ionos

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Do you need any further information?

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