



***ISG** Provider Lens™

2021

Public Cloud – Services
& Solutions 2021

imagine your future®

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 last financial year, the increase in public cloud adoption among enterprises was mainly triggered by the COVID-19 pandemic, along with other factors such as the growing digital transformation engagements, increasing recognition of the importance of cybersecurity and expanding remote working environments. The increased maturity of the cloud industry made a major impact on both enterprises and IT service providers, with both buyers and consumers witnessing a huge shift the buying behavior, from physical to digital. For enterprises, this has also impacted business models, requiring digital initiatives and recognizing the need to address governance, risk and compliance norms. Considering the widespread adoption of the as-a-Service model, enterprises need to continuously evaluate cloud service providers, globally, mainly due to growing security concerns and the dynamic nature of the business landscape. Enterprises continue to seek providers that can act as strategic partners in carrying out cloud transformation engagements on major hyperscalers (AWS, Microsoft Azure and Google Cloud Platform). The provider will also continue to manage the workloads on an on-going basis, and help enterprises control, optimize and manage cloud expenses through FinOps strategies.

ISG reports a strong demand for digital transformation engagements, which, in turn, is driving global contracts for cloud products and services, including Infrastructure-as-a-Service (IaaS) and Platform-as-a-Service (PaaS). According to the latest 1Q21 ISG Index™, the global market has grown 11 percent in combined market annual contract value (ACV) to reach its current value of US\$17.1 billion year-over-year, while the as-a-Service ACV has increased by 17.2 percent to reach US\$9.9 billion in the same period. Also, the IaaS market grew by 18 percent to reach US\$7.2 billion, while the SaaS market grew by 7 percent to reach US\$2.7 billion.

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

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

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

Quadrants Research

As part of this quadrant study, ISG is introducing the following six quadrants on public cloud solutions and services:

Public Cloud - Services and Solutions 2021	
Consulting and Transformation Services	Managed Public Cloud Services
Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Secure Enterprise Filesharing Services	Cloud FinOps Platforms

Source: ISG 2021

Consulting and Transformation Services

This quadrant assesses service providers or service integrators that offer consulting and transformation services for public cloud engagements. Public cloud enables enterprises to achieve agility and scalability without the need to invest in their own infrastructure, which makes it an integral aspect of digital transformation. Participating service providers have partnerships with public cloud infrastructure providers to offer ideation of multicloud programs, industry cloud solutions and manage customer-specific complexities of adopting and deploying public cloud solutions. These providers have highly skilled developers and software architects who leverage design thinking, SCRUM initiatives and short work cycles to meet growing customer demands.

Provider services typically include the following:

- **Consulting services:** Consultants design a business case for cloud; assess a workload for migration; build a transformation roadmap, which includes addressing risk and compliance issues; and advise on migrating applications from the existing environment to a public cloud.
- **Transformation services:** Cloud experts design and build cloud architecture/environments, and migrate and integrate applications to harness cloud computing features and benefits.
- **Governance, risk and compliance services:** Cloud experts design frameworks, policies, processes and functions to ensure that enterprise cloud workloads are run in a secure and compliant environment, regardless of location. As governance, risk and compliance has become a mainstream requirement from a CXO's office, the industry expects these to be an integral part of transformation engagements.

Eligibility criteria:

- Methods and frameworks to analyze a client's IT landscape, and help them avoid additional technical debts and realize value in their IT spending;
- Experience in planning and implementation of multicloud services for major industry verticals;
- Application migration experience (templates, automation engines and many more techniques) in conjunction with cloud-native application development for brownfield workloads;
- Hyperscale-provider-related partner program certifications;
- Robust APIs for application and service integration in public cloud;
- Ability to drive governance, risk and compliance for large transformation programs;
- Migration through cloud native application development for brownfield workloads.

Managed Public Cloud Services

This quadrant assesses service providers and service integrators that offer managed public cloud infrastructure and application services. Managed service providers of public cloud offer professional and managed services on top of public cloud IaaS providers/hyperscalers (AWS, Microsoft Azure, Google Cloud Platform) through a DevOps- and DevSecOps-centric approach and help enterprise build a robust CI/CD pipeline with strong container management capabilities. Under the managed public cloud services umbrella a provider is responsible for providing site reliability engineering and business resiliency.

Broadly, these services include cloud services lifecycle management, real-time and predictive analysis, and monitoring and managing a customer's public and multicloud environment, with the aim to maximize the performance of workloads in the cloud, reduce costs and ensure compliance and security. Typically, specially developed or licensed cloud management platforms and tools are used to serve customers with maximum automation, and provide the necessary transparency on the managed cloud resource pool, in terms of capacity utilization and costs, including self-service administration. In addition to the technical services a provider offers dashboards to analyze and forecast financial impacts and propose optimization of the services.

Provider services typically include the following:

- Professional services for the management and monitoring of CPU, storage, memory, databases, and operating systems as standalone or micro services or virtual machine and container services;
- Operating system, middleware and application upgrade services;
- Cloud infrastructure management platform for cloud-cost management (charge back and show back), identity management and IT service management;
- Monitoring, logging, patching, and predictive analytics services to guarantee performance and security improvements throughout a container lifecycle to enable continuous integration and delivery;
- Governance and compliance management, along with a robust cybersecurity framework and platform for securing client data in multiple geographies;
- 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 multicloud environments, along with expertise in managing configurations of platforms and systems as well as that of containers;
- Financial dashboards and cost analysis tools, providing visibility of variable costs associated with cloud providers through FinOps ecosystem;
- Support for software code development and cloud-native and legacy system integration by leveraging DevOps, API-enabled automation and cloud analytics services;
- Robust cybersecurity managed services offering;
- Partnerships with relevant public cloud providers and respective managed-service-provider certificates for AWS, Microsoft Azure, GCP, or others.

Hyperscale Infrastructure and Platform Services

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

Eligibility criteria:

- Innovative portfolio of infrastructure services (computing power, memory, network, backup, etc.) and container management functions;
- Easy access, transparent prices, dynamic (consumption-based) and fixed (reserved) billing models;
- Recognized standards and certifications, strong focus on data protection and sophisticated cybersecurity approach;
- Support for Infrastructure as code (IaC) 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;
- Specialized hardware for custom requirements and high-performance computing requirements for processes leveraging ML to train algorithms for AI services;
- Open architecture and well-documented (web service) APIs or middleware layer to join multiple clouds or services and platforms;
- Specialized partner program with a broad partner ecosystem to support local customer requirements.

SAP HANA Infrastructure Services

This quadrant assesses cloud infrastructures best suited to host SAP's software portfolio, with emphasis on SAP S/4HANA workloads and large-scale HANA databases. Participating vendors offer IaaS, including infrastructure operations, facilities, provisioning and scaling capacity for SAP workloads. IaaS providers should offer data migration, system imaging, backup, restore, disaster recovery, resource usage monitoring and dashboard management services. Tools required for this can be a part of standard IaaS offerings or be provided by partners in a marketplace.

The participating vendor should also provide pre-sales support to help clients on the migration plan, cloud architecture, sizing and performance optimization, licensing, system and database configuration, virtual private network configuration and third-party vendor solutions (toolset). The support analysis focuses on the vendor's service partner ecosystem and the ability to conduct related migrations and operations.

Eligibility criteria:

- IaaS includes servers, storage and connectivity specific to the SAP product line;
- Memory capacity should be above 6 TBs;
- Easy access, transparent prices, dynamic (consumption-based) and fixed (reserved) billing models;
- Recognized standards and certifications, strong focus on data protection and sophisticated cybersecurity approach;
- Offer SAP IaaS certified platforms;
- Test and development environments, including workflows and log/report functionality for rollouts;
- Direct operations or at least one authorized partner or client relationship and compliance with local regulations regardless of data center location.

Secure Enterprise Filesharing Services

This quadrant assesses vendors that offer enterprise-grade filesharing platforms in cloud environments. Cloud-file-sharing vendors offer enterprises the service to store and access data through a SaaS model. Functionality includes storage of business-related documents that are accessible via a browser, desktop or mobile application. These platforms also help enterprises synchronize data on-premises and in the cloud. File-Sharing-as-a-Service also includes a marketplace of third-party integrations, including email and productivity, social media, and project management solutions.

**Note: This quadrant primarily focuses on filesharing services and does not analyze prominent features of collaboration services, which is being covered in our Workplace services IPL study.*

Eligibility criteria:

- Real-time activity on files when multiple stakeholders are working;
- Strong administrative controls and secure access management capabilities with a single-pane-of-glass-type dashboard;
- Robust and secure multi-factor authentication for access management;
- Meet all data protection compliance DSGVO guidelines, along with end-to-end encryption of data (in motion and at rest) and offer a secure key management solution;
- Desktop integration capabilities and offline features, along with the ability to synchronize files across all connected devices such as desktops, mobile devices and tablets;
- Integration capabilities across operating systems such as Windows, Android, Apple MacOS and iOS, and compatibility with popular office suites and filesystems such as FAT32, NTFS and Ext (4), along with integration with third-party software;
- File recovery and rollback capabilities for version tracking with rich user experience.

Cloud FinOps Platforms

This quadrant assesses independent software vendors (platform and tool providers) that offer cloud financial management solutions to manage cloud costs across multiple public clouds. The inherent objective is to help clients across functional teams and lines of business, and support various stakeholders to maintain financial accountability for the cloud services used. This involves defining shared cost responsibilities across lines of business, IT teams and the finance department. Cloud FinOps experts are responsible for managing variable costs and usage of cloud services, and require FinOps platforms that allow them to report on cost and usage, allocate the costs to the appropriate stakeholders/users, optimize both usage and price models, recommend engineering changes that would provide value, and continuously assess the effective use of cloud services in lieu of budgets and business objectives. In this quadrant, the vendors that offer cloud FinOps as a standalone solution and sell it as a licensing model or any other standard pricing model have been considered.

Eligibility criteria:

- Reporting and optimization that can be tailored to the needs of various personas (finance, IT, and business unit), based on the same sources of data, and through a single console;
- Interface with multicloud service providers and other tools to collaborate and combine data via APIs;
- Search and identify irregularities, and remove under-utilized services;
- Allocate shared costs for shared resources, functions, or services and track them to create business case with deep financial nuances;
- Forecast to better plan cloud expenditures, with the ability to conduct cost-trend and benchmarking analyses;
- Centralized commitment-based cloud infrastructure buying process, along with transparency in reporting and optimizing these costs;
- FinOps capabilities to support multicloud environments;
- Accreditation by FinOps foundation.

Quadrants by Region

Quadrants	Global	U.S.	Germany	CH	U.K.	Nordics	France	Brazil
Consulting and Transformation Services	Overview	✓	✓	✓	✓	✓	✓	✓
Managed Public Cloud Services	Overview	✓	✓	✓	✓	✓	✓	✓
Hyperscale Infrastructure and Platform Services	Overview	✓	✓	✓	✓	✓	✓	✓
SAP HANA Infrastructure Services	Overview	✓	✓	✓	✓	✓	✓	✓
Secure Enterprise Filesharing Services	Overview		✓					
Cloud FinOps Platforms	✓							

Archetype Report

In this report, we identify and classify the typical buyers of public cloud and outsourcing services (managed and transformation services), that look for transformational capabilities, cost reduction and innovation. We have identified five major buyer archetypes:

- **Traditional Outsourcers:** Buyers that focus primarily on cost reduction and seek outsourcing/staff augmentation assistance for basic monitoring activities.
- **Next-gen Cloud Managed services:** Buyers that look for a broader suite of managed services with some elements of transformation and cloud native skills.
- **Transformational:** Buyers that have already achieved a high level of virtualization or standardization and are looking to transform their infrastructure further to become digital.
- **Pioneering:** Buyers that aspire to achieve high levels of automation, orchestration and implementation of a software-defined infrastructure for boosting developer productivity and innovation.
- **Highly Regulated:** Buyers that have significant compliance and security requirements.

Schedule

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

Milestones	Beginning	End
Launch	June 14, 2021	
Survey Phase	June 14, 2021	July 9, 2021
Sneak preview	October 2021	
Press release	December 2021	

Please [refer to this link to view/download](#) the ISG Provider Lens™ 2021 research agenda.

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.

2nd Watch	Baggenstos	CloudSigma
3stepIT	Basefarm (Orange Business Services)	Cloudwize
7P	BearingPoint	Coforge
Abraxas	Bechtle	Cognizant
Accenture	beck et al.	Columbus
Acora	Be-Cloud	Comline SE
Adacor	Birlasoft	Compasso UOL
adesso	BitHawk	Computacenter
adlon	BMSIX	Crayon
Alfresco	Box	Ctera
Alibaba	Brainloop	Cybercom
All for One Group	Brasoftware	d.velop
AllCloud	BRLink	Datadog
Allgeier ES	BT	Datagroup
Amanox Solutions (S&T)	BTC	DataOne
Apalia	CANCOM	Dedalus
Apptio	Capgemini	Deloitte
Arvato Systems	CenterDevice	Densify
ATEA	CGI	Deutsche Telekom
Ativy	Citrix	Devoteam Alegri
Atos	Claranet	Devoteam Revolve
Avanade	Cloud Temple	Digital Ocean
Avectris	Cloudcheckr	direkt gruppe
AWS	Cloudreach	doubleSlash
Axians		DRACoon

Dropbox	INS Systems	MTF
DXC	IONOScloud	Netcloud
Econis	IPNET	Netfiles
Edifixio	IPsense	netlution
Eficode	IPT	Neurones IT
Embratel	IT Point Systems	Nextcloud
Enfo Group	Itadel	Nextios
Ensono	itera	Nine
essence IT	ITESYS	Nixu
EveryWare	kamp	NNIT
Exoscale	KPMG	Node4
Fujitsu	Kreuzwerker	Noris Technologies
Giant Swarm	KubeCost	NTT
Global Access	LINKBYNET	NTT DATA
Globalweb	Logicalis	NTT Group
Google	Logicalis (Orange Networks)	oneadvanced
Grass-Merkur	Logicata	Opsani
HCL	LTI	Oracle
Henson Group	Lumen (CenturyLink)	Orange Business Services
Hexaware	Materna	OVHcloud
HighQ	Microfocus	ownCloud
Huawei	Microland	oXya
IBM	Microsoft	Pileus Cloud
Infinite	Mindtree	PlusServer
Infoniqa	Mphasis	Proact
Infosys	msg	procloud

Protera
PwC
Pythian
QSC
Rackspace Technology
ratiokontakt
Red Hat
Release42
Reply
root360
SantoDigital
SAP
ScaleUp Technologies
Senacor
Sentia
SGA Tecnologia
Sky.One
Slalom
Smart IT
Software One (Comparex)

SoftwareOne
Solita
Solteq oy
Somnitec
Sonda
Sopra Steria
Splunk
Stack Labs
Stefanini
Strato
Swisscom
Syntax (FIT)
TCS
TeamDrive
Tech Mahindra
tecRacer
Ternary
ti&m
TietoEVRY
TIVIT

TO THE NEW
Trasnputec
Trianz
Trivadis
T-Systems
UMB
Unisys
UST Global
V8 Consulting
Venha Pra Nuvem
Virtusa
Virtustream
Visolit
Vodafone
VSHN
Wagner
Wipro
Zensar

ISG Star of Excellence™ – Call for nominations

The Star of Excellence is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer”. The Star of Excellence is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence [website](#)

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply. Here is the email address: ISG.star@isg-one.com

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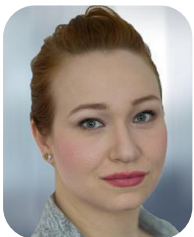
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