

Multi Public Cloud Services

Assessing services and providers for U.S. state and local governments and educational organizations



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The accelerated expansion of public cloud services and their use in back-office and public-facing systems and operations have been one of the most significant changes in the public sector IT over the past few years. In the wake of the COVID-19 pandemic, widespread loss of staff and budget uncertainties, U.S. state, local and education (SLED) organizations have been among those agencies rapidly expanding public cloud services.

Such expansion results in potentially expensive complications and questions. Clients need a growing range of strategic and operational services to develop effective approaches, identify and resolve likely issues, and enable adaptive optimization as cloud use expands and shifts.

This ISG Public Sector Provider Lens™ research study assesses select providers of consulting, infrastructure and managed public cloud services for U.S. state and municipal government, public education and associated public sector agencies. The study includes providers of public cloud hyperscale infrastructure services, consulting and

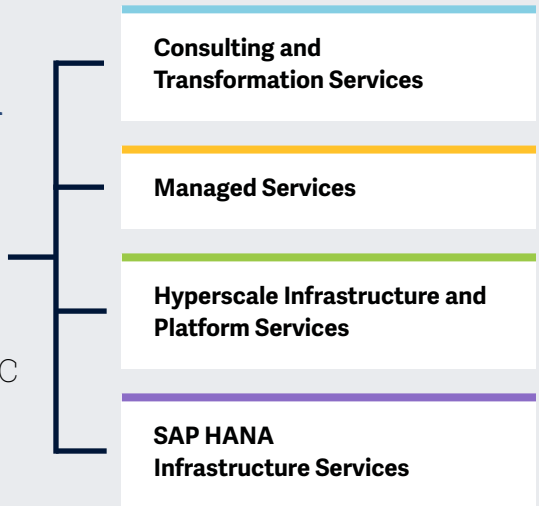
transformation services, managed services, and infrastructure services for SAP HANA environments. Each of these is described in detail below.

ISG clients use these studies for provider and vendor consideration, evaluation and selection. ISG's advisory and consulting teams can also help clients understand the scope of capabilities and offerings suitable to clients' requirements. The studies also provide competitive insights for vendor and provider positioning, key relationships and go-to-market considerations.



This 2023 **Multi Public Cloud Services** report examines services and providers regarding four key areas for U.S. Public Sector clients.

Simplified Illustration; Source: ISG 2023



Definition

This ISG Provider Lens™ Multi Public Cloud Services 2023 study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.

Our study serves as an important decision-making basis 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 engagements.



Consulting and Transformation Services

Definition

This quadrant evaluates providers that help public sector organizations modernize, optimize and transform their use of public cloud services to increase efficiency, agility and security.

Providers in scope utilize highly skilled developers and software architects who leverage design thinking, Scrum development initiatives, and short work cycles to meet the growing customer demands. They also partner with public cloud infrastructure providers to offer creative approaches for multicloud programs, industry cloud solutions and customer-specific complexities faced during the adoption and deployment of public cloud services and solutions.

Provider services typically include the following:

- **Consulting services:** Consultants design a business case for multicloud environments and assess workloads for migration. They also build a transformation roadmap to address risks, security and compliance issues and offer guidance on migrating applications from the existing environment to a public cloud.

- **Transformation services:** Cloud services experts design and build multicloud architectures or environments. They also support migrating and integrating applications to harness cloud computing features and benefits.
- **Governance, risk and compliance (GRC) services:** Cloud experts design frameworks, policies, processes and functions to ensure that enterprise cloud workloads operate in a secure and compliant environment regardless of the location.

Eligibility Criteria

1. **Public sector presence and expertise**, especially for U.S. SLED organizations
2. **Methods and frameworks** to analyze IT landscapes, help avoid additional technical debt and realize the value in their IT expenditure
3. Experience in **planning and implementing multicloud services** for sector clients
4. **Application migration experience** (templates, automation engines and many other techniques) with cloud-native application development for greenfield and brownfield workloads
5. **Partner and practice certifications** with multiple cloud service hyperscalers
6. **API libraries** for application and service integration in public cloud
7. Demonstrated competence in **governance, risk and compliance** for sector clients, especially in complex environments
8. **Carbon-neutral strategy** and operations management expertise



Managed Services

Definition

This quadrant assesses service providers and integrators offering managed infrastructure and application services on public cloud infrastructure such as AWS, Microsoft Azure and Google Cloud Platform (GCP).

Typically, such services include cloud services lifecycle management, real-time and predictive analysis, and monitoring and management of customers' public and multicloud environments to maximize workload performance in the cloud, reduce costs and ensure compliance and security. Licensed or owned cloud management platforms provide maximum automation and increased visibility into cloud resources in terms of utilization and costs, including self-service administration.

Providers should also offer cloud optimization using, FinOps frameworks to analyze and forecast financial and organizational impacts.

Provider services typically include the following:

- Professional services for managing and monitoring CPUs, storage, memory, databases and operating systems as standalone or microservices, virtual machines and container services
- Automated upgrade services for operating systems, middleware and applications on public cloud infrastructure
- Hybrid cloud infrastructure management platforms to manage cloud cost, entity identity, FinOps and IT services
- Ability to monitor, log, patch, predict and provide analytics services to improve performance and security for continuous integration and continuous delivery (CI/CD)
- Governance and compliance management with a robust cybersecurity framework and platform(s) for securing client data
- Support services such as incident management, configuration, security services and automation setup

Eligibility Criteria

1. **Public sector presence and expertise**, especially for U.S. SLED organizations
2. **Operational excellence** and well-defined professional services
3. Experience in **building and managing public and multicloud** environments
4. Expertise in **managing configuration and integrating** platforms, systems and containers
5. **Financial dashboards and cost analysis tools** enabling cloud cost visibility
6. Support for **software development and cloud-native and legacy system integration** by leveraging DevOps, API-enabled automation and cloud analytics
7. **Robust cybersecurity** managed services offerings
8. **Managed service provider certificates** with leading hyperscalers such as AWS, Microsoft Azure, or GCP
9. **Industry-specific solutions and expertise**, including managing different workloads on public cloud infrastructure



Hyperscale Infrastructure and Platform Services

Definition

This quadrant assesses providers of infrastructure-as-a-service (IaaS) and platform-as-a-service (PaaS) capabilities that are critical to public sector organizations' ability to operate in a secure and adaptable manner on and across one or more public clouds.

Service providers in this quadrant characteristically offer compute services, storage and network resources. Typically, these are provided as virtual or containerized software-defined offerings operating on serverless architectures. Providers' ability to deliver such services in compliance with multiple levels of sector-specific security requirements is critical for public sector clients.

Providers offer multiple microservices and runtime engines for predefined, cloud-based application development. These services help address complete lifecycle needs for building, migrating or modernizing applications, including large-scale and core business management applications.

Additional provider capabilities typically include middleware, business process management, collaboration networks, databases, analytics and ML capabilities. Internal and external (third-party) services, including tools and applications from independent software vendors (ISVs), can be made available through customer-configured, provider-managed, secure marketplaces in an approved app store environment.

Eligibility Criteria

1. **Public sector presence and expertise**, especially for U.S. SLED organizations
2. Innovative portfolio of **infrastructure and container management** offerings
3. Sector- and client-optimized **buying and pricing models**
4. **Support for sovereign cloud mandates** for governance and data transparency requirements
5. Certification in **data protection and cybersecurity**
6. Support for infrastructure as code (IaC) and serverless computing with **highly automated** provisioning, event triggering and failover
7. **Test and development environments**, including workflows and log/report functionality for rollouts
8. **Custom and high-performance computing** capabilities for varied requirements, including AI algorithm training
9. Open architecture with **APIs or middleware** to join multiple clouds or services and platforms
10. **Broad partner ecosystem** to support client requirements



SAP HANA Infrastructure Services

Definition

This quadrant assesses service providers with infrastructure, development and managed services capabilities that are suited to host SAP's software portfolio, with an emphasis on SAP S/4HANA workloads and large-scale HANA databases.

Participating service providers offer IaaS that includes infrastructure operations, facilities, provisioning and scaling capacities for SAP workloads. Providers should also deliver data migration, system imaging, backup, restore, disaster recovery, resource usage monitoring and dashboard management services. The required tools can either be part of the providers' standard IaaS offerings or offered by partners in a secure marketplace.

Service providers should further offer presales consulting and support services to help clients address their complex needs, including platform and data migration, cloud architecture,

sizing and performance optimization, licensing, system and database configuration, virtual private network configuration and third-party vendor solutions (toolsets).

Lastly, our assessment includes an assessment of providers' own support offerings (and the levels of support offered) and providers' service partner ecosystems, with their ability to conduct related migrations and operations.

Eligibility Criteria

1. **Public sector presence and expertise**, especially for U.S. SLED organizations
2. IaaS, including **servers, storage and connectivity** specific to SAP
3. Memory **capacity above 6 TB**
4. Offering **SAP IaaS-certified platforms**
5. Sector- and client-optimized **buying and pricing models**
6. Recognized **standards and certifications**, including a strong focus on data protection and sophisticated cybersecurity environments
7. **Test and development environments**, including workflows and log/report functionality for rollouts
8. Certification as an **SAP services partner**
9. Established sector-optimized **partner ecosystem and support organizations** to enable changing client support capabilities



Quadrants by Region

As part of this 2023 ISG Provider Lens™ quadrant study, we are assessing the following four Multi Public Cloud Services quadrants:

| Quadrant | U.S. Public Sector |
|---|--------------------|
| Consulting and Transformation Services | ✓ |
| Managed Services | ✓ |
| Hyperscale Infrastructure and Platform Services | ✓ |
| SAP HANA Infrastructure Services | ✓ |



The research phase falls in the period between June and August 2023, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in December 2023.

| Milestones | Beginning | End |
|-----------------------------|------------------|---------------|
| Survey Launch | June 5, 2023 | |
| Survey Phase | June 5, 2023 | June 30, 2023 |
| Sneak Previews | October 2023 | |
| Press Release & Publication | December 2023 | |

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2023 research agenda

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

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.



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

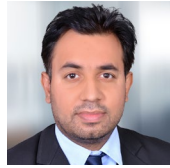


Contacts For This Study



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**Manikanta
Shankaran**

**Global Project
Manager**



ISG Provider Lens™ Advisors Involvement Program

ISG Provider Lens™ offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisor to this study



Alex
Perry

Director



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

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|-----------------|-----------------------------|--------------------------|-------------|
| 2nd Watch | ECS Federal / EGlobalTech | Microsoft | Unisys |
| A&T Systems | Emergent | NTT DATA | UST |
| Accenture | EY | Oracle | Virtustream |
| Alibaba | Fujitsu | OVHcloud | Wipro |
| Atos | Gainwell Technologies (DXC) | PwC | Zensar |
| AWS | Google | Rackspace Technology | |
| CALIBRE Systems | HCLTech | Red River Technology | |
| Capgemini | Hitachi Vantara | SAP | |
| CGI | IBM | Strategic Communications | |
| Cognizant | Infosys | TCS | |
| Deloitte | KPMG | Tech Mahindra | |
| DigitalOcean | Kyndryl | Tetra Tech | |
| DXC Technology | LTIMindtree | T-Systems | |



ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready 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 isg-one.com.



JUNE, 2023

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