ISG Provider Lens™

Multi Public Cloud Services

A research report comparing provider strengths, challenges and competitive differentiators

Table of Contents 🏠

Introduction

This ISG Provider Lens study evaluates providers offering public cloud solutions tailored specifically for U.S. public sector organizations, including state, local and educational (SLED) agencies. The study assesses consulting and transformation services, managed services, hyperscale public cloud infrastructure and platforms, FinOps services, SAP environments and related services.

Public cloud infrastructure has become the preferred choice for SLED agencies undertaking infrastructure transformation and application development projects. Intelligent automation tools streamline data management processes, allowing SLED agencies to focus on core missions and innovation rather than routine tasks. Furthermore, utilizing public cloud infrastructure aligns with sustainability goals by reducing the environmental impact associated with traditional data centers.
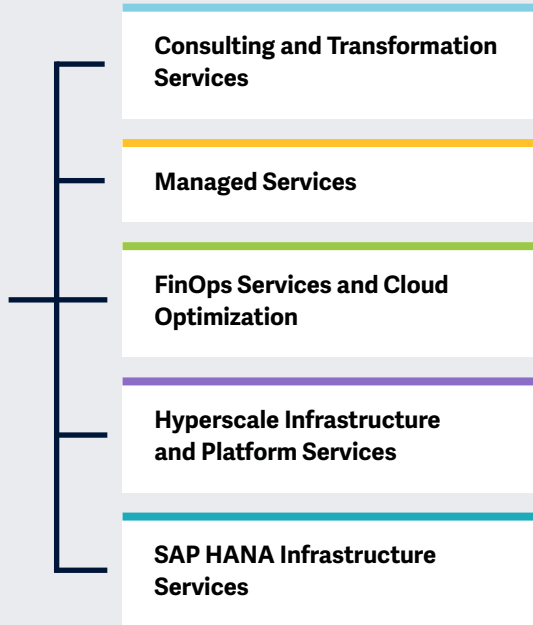
ISG is seeing rising interest in secure public cloud capabilities among data-sensitive agencies. Priorities include data sovereignty, robust security and flexibility in data storage location selection, access control and encryption key management to ensure compliance with local regulations and safeguard sensitive information. Public clouds increasingly enable robust and enhanced security features, addressing data protection and privacy concerns.

SLED agencies are increasingly interested in GenAI to improve productivity, streamline operations and unlock new avenues for innovation. This trend highlights the importance of selecting cloud providers that lead in AI development, adoption, adaptation and integration capabilities for SLED agencies.

This study focuses on what ISG perceives as most critical in 2024 for **multi public cloud services** for U.S. public sector clients.

Simplified Illustration Source: ISG 2024

Consulting and Transformation Services

Managed Services

FinOps Services and Cloud Optimization

Hyperscale Infrastructure and Platform Services

SAP HANA Infrastructure Services

The ISG Provider Lens™ Multi Public Cloud Services 2024 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 based on their competitive strengths and portfolio attractiveness
- Focus on U.S. public sector market.

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 assesses service providers that partner with multiple public cloud infrastructure providers to offer multicloud strategy and industry cloud solutions that manage client-specific complexities involved in adopting and deploying public cloud services. These providers typically employ highly skilled developers and software architects who use design thinking principles and short work cycles to meet client demands. Provider services typically comprise the following:

- **Consulting services** include business case design for multicloud environments and workload migration assessments. Service providers offer transformation roadmaps addressing security tools, networking and connectivity, data services, analytics, computing performance and guidance on application modernization for migration to public clouds.

- **Transformation services** include cloud architecture and engineering for designing, building and configuring multicloud environments. These services also support migrating and integrating applications to harness cloud computing security. Providers introduce AIOps and FinOps to enable advanced infrastructures that facilitate cloud-native application development and operations.

- **Compliance services** include environmental, sustainability and governance (ESG) and security services. Providers use best practices and frameworks to design cloud policies, processes and functions to enable healthy, sustainable, secure and compliant environments regardless of location. From a chief experience officer's (CXO's) perspective, ESG has become a mainstream requirement, making it an integral part of every transformation engagement.

Eligibility Criteria

1. Established business in **planning and implementing multicloud services** among public sector client organizations, especially in SLED agencies

2. **Application modernization strategies** addressing cloud-native services and API libraries for service integration, including DevOps automation, AIOps, GenAI and infrastructure as code (IaC) deployments and cross-cloud integration

3. Methods and frameworks to **analyze clients' IT landscapes,** optimize IT spending and prevent additional technical debts

4. Experience in **application migration** (templates, automation engines and other techniques) **and cloud-native application development**

5. **Certified competence** with hyperscalers, including AWS, Azure and Google Cloud

6. Experience and solutions regarding **ESG transformation programs,** including carbon-neutral strategies and associated green business outcomes and benefits

Managed Services

Definition

This quadrant assesses providers specializing in managing day-to-day hyperscale environment operations. These providers adopt a DevOps-centric approach to support robust CI/CD pipelines with strong container management capabilities. They also offer expertise in site reliability engineering (SRE) and business resiliency.

These providers typically offer managed services such as cloud infrastructure lifecycle management and real-time multicloud monitoring with predictive analytics to maximize performance, reduce costs and protect compliance and security. Service providers use AIOps and GenAI tools to automate processes, auto-scale and optimize resources, offer predictive analytics and more. FinOps tools enable transparency in cloud utilization and costs. Typical service platforms include service catalogs, approval workflows and self-service and self-heal capabilities. Provider capabilities typically include:

- Management and monitoring for virtual machine CPU utilization, memory, database performance, storage, microservices, containers, logs and service agents
- Patching and upgrading for operating systems, middleware and applications, plus security patching, access control and identity management
- ITSM, including incident management, problem management and release management
- FinOps-based monitoring and reporting, covering resource utilization, multicloud billing aggregation, invoice management, chargeback and showback
- ML and predictive analytics to improve performance and security
- Self-service catalogs that automate provisioning, container management, service on/off scheduling, IaC and DevOps automation
- Governance and compliance management, along with a robust cybersecurity framework

Eligibility Criteria

1. **Public sector-specific** solutions and **practice knowledge** for managing workloads on public cloud infrastructures

2. **Operational excellence** and well-defined professional services for public sector clients, especially SLED organizations

3. Experience in building and **managing public and multicloud** environments

4. Expertise in managing **platform configuration, integration,** systems and **containers**

5. **Financial dashboards and cost analysis** tools supporting FinOps

6. Support for software code development and **cloud-native and legacy system integration** by leveraging DevOps, API-enabled automation and cloud analytics services

7. Robust **security posture and cloud governance** services

8. **Partnerships with leading public cloud providers** and relevant managed service provider certifications with AWS, Microsoft Azure, Google Cloud and others

FinOps Services and Cloud Optimization

Definition

This quadrant assesses service providers that offer cloud infrastructure cost optimization consulting and managed services for AWS, Microsoft Azure, Google Cloud and other public cloud platforms for public sector clients.

Clients expect providers to actively manage FinOps tools to maximize cloud resource utilization and improve automation and autoscaling capabilities. Contractual terms enable providers to operate on behalf of clients to facilitate activities such as buying and selling reserved instances, upscaling and downscaling resources and enabling dynamic cost allocation changes.

Leaders in this quadrant demonstrate the ability to predict clients' consumption patterns and cloud price changes using AI- and ML-based analytics. They use FinOps frameworks, comprising proprietary and third-party tools, to analyze and forecast usage, pricing and financial impacts. Providers also use data analytics to identify underutilized resources and optimization opportunities.

Typical engagements include workload assessments to analyze and reduce cloud expenses and maximize cost efficiency, and cloud governance advisory services for activities such as user rights, service approval workflows, audit tracking (setting of logs/agents/reports) and defining compliance check methods, configuration policies, data access policies and service reporting configurations that include tagging, chargeback and showback functionalities.

Eligibility Criteria

1. Offer public sector-specific solutions and **practice knowledge**

2. **Employ full-time employees (FTEs)** that are **FinOps-certified in multiple hyperscalers** such as AWS, Microsoft Azure, Google Cloud and Oracle Cloud

3. Develop **FinOps framework, strategy and implementation roadmaps** optimized for sector needs and client organizations

4. Create engagement models, including **cost-saving targets** centered on **budget control** SLAs

5. Enable the development of **clients' own, internal FinOps teams** from various departments, agencies and operating groups

6. Empower clients with **organizational change management (OCM)** for sustainable FinOps practices

7. **Demonstrate optimization expertise** beyond FinOps data gathering, analysis and reporting

Hyperscale Infrastructure and Platform Services

Definition

This quadrant assesses providers offering and supporting virtual compute resources, middleware and software in highly scalable public cloud environments tailored for public sector client organizations, and consumed by clients as on-demand and web-centric services.

Compute services and storage and network resources are typical services in qualified providers' IaaS portfolios. All these services are provided as virtual or containerized software-defined offerings and complemented by serverless architectures. GenAI capabilities increasingly automate resource provisioning, cost and performance optimization, dynamic scaling and support.

Qualified hyperscaler PaaS portfolios usually include multiple microservices and runtime engines for predefined cloud-based application development that typically addresses developers' complete lifecycle needs in building or modernizing applications. Valuable offerings also include middleware, business process management, collaboration networks, databases, analytics and ML capabilities.

Additional internal and external (third-party) services are frequently accessible through marketplaces. Providers offer GenAI capabilities to optimize application deployment and DevOps integration, monitor application performance and suggest ways to optimize.

Eligibility Criteria

1. Portfolio with **computing power,** memory, storage, network, backup and container management functions **optimized for public sector clients**

2. Toolset with specialized hardware and large language models (LLMs) to enable and advance **AI- and ML-based projects,** including **GenAI services**

3. **Price transparency** with consumption-based and reserved billing models

4. Sector-focused **competency and service certifications,** including data center and facilities certification

5. Strong focus on **data location, data protection** and sophisticated **cybersecurity solutions**

6. Support for IaC and **serverless computing** in combination with **automated provisioning,** event triggering and failover

7. APIs to **connect multiple clouds,** SaaS and web services

8. **Partner program** with a vast partner ecosystem

SAP HANA Infrastructure Services

Definition

This quadrant assesses cloud infrastructure providers best suited to optimize SAP's software portfolio for public sector organizations, including SAP S/4HANA workloads and large-scale HANA databases. Positioned providers offer IaaS, including infrastructure operations, facilities, provisioning and scaling capacity for SAP workloads.

Key criteria for assessment include IaaS providers' data migration tools, technical support, system imaging, backup and restore capabilities, disaster recovery solutions, resource usage monitoring and dashboard management solutions. These tools may be part of the standard IaaS offerings or provided by partners in a marketplace.

Ideally, the infrastructure provider should have a broad ecosystem, including SAP partners, enabling it to support clients in automating and operating their SAP instances in the cloud. Participation in the RISE with SAP program enables strong positioning in this quadrant. However, RISE participation is not mandatory for inclusion in these assessments.

The cloud infrastructure provider should also offer pre-sales support to help clients with migration planning, cloud architecture design, sizing and performance optimization, licensing considerations, system and database configuration, virtual private network (VPN) configuration and third-party vendor solutions (toolsets). The support analysis focuses on the vendor's service partner ecosystem and its expertise in conducting related migrations and operations.

The hyperscaler should offer GenAI capabilities to optimize tasks and operations, including resource allocation, dynamic scaling, performance and cost optimization and automate backup schedules.

Eligibility Criteria

1. Demonstrated expertise in **public sector SAP landscapes,** including application and data migration

2. IaaS offerings, including **SAP-certified servers** with storage and connectivity for SAP products

3. Availability of **SAP HANA instances** in multiple memory sizes, enabling **on-demand upscaling** to accommodate instance growth and upgrades with minimum service interruptions

4. Memory capacity exceeding **6 TB per virtual machine**

5. Easy access, **transparent pricing** and various billing models, including consumption-based, reserved instance and dedicated instance

6. Recognized **quality standards** and **service certifications**, with a strong focus on **data protection and cybersecurity**

7. **Low-cost storage** for backups and archiving

8. **Multiregion** disaster recovery capabilities, including automated **backup and restore functionality**

9. **Certified partners** specializing in SAP

Quadrants by Region

This ISG Provider Lens™ quadrant study includes the following five quadrants:

Quadrant	U.S. Public Sector
Consulting and Transformation Services	✔
Managed Services	✔
FinOps Services and Cloud Optimization	✔
Hyperscale Infrastructure and Platform Services	✔
SAP HANA Infrastructure Services	✔

The research phase falls between June and August 2024, during which the survey, evaluation, analysis and validation will take place. The results will be presented to the media in December 2024.

Milestones

Milestones	Beginning	End
Survey Launch	June 5, 2024	
Survey Phase	June 5, 2024	July 3, 2024
Sneak Preview	October 2024	
Press Release & Publication	December 2024	

Collecting client testimonials via the Star of Excellence Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the link to view/download the ISG Provider Lens™ 2024 research agenda.

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to the instructions 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

ISG Star of Excellence

Methodology & Team

The ISG Provider Lens 2024 – Multi Public Cloud Services research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
Heiko Henkes

Lead Analyst:
Bruce Guptill

Research Analyst:
Manoj M

Data Analysts:
Sachitha Kamath and Lakshmikavya Bandaru

Project Manager:
Manikanta Shankaran

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of June 2024 for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

Contacts For This Study

Study Sponsor

Heiko
Henkes

**Managing Director,
Provider Lens**

Bruce
Guptill

**Lead Analyst – U.S.
Public Sector**

Manoj M

**Research
Analyst**

Sachitha
Kamath

**Senior
Data Analyst**

Lakshmikavya
Bandaru

**Senior Data
Analyst**

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 consultant advisors participate as part of each study's quality and consistency review process.

The consultant 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 Advisors 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.

2nd Watch	DXC Technology	KPMG	PwC
AandT Systems Inc.	Ensono	Kyndryl	Rackspace Technology
Accenture/Avanade	Eviden	LTIMindtree	SAP
ACK Storm	Evotech	Marlabs	Syntax
AIS/Applied Information Sciences	EY	Matrix/Cloudzone	TCS
Antimetal	FinOptik	Microsoft	Tech Mahindra
Atos	Fujitsu	MissionCloud	TO THE NEW
AWS	Google	Mphasis	Trianz
Birlasoft	HCLTech	Navisite/Accenture	Unisys
Brooksource	Hexaware	NTT DATA	UST
Capgemini	Hitachi Digital	Ollion (2nd Watch)	Virtusa
CGI	Hitachi Digital Services	Oracle	Virtustream
CitiusTech	HPE Greenlake	OVHcloud	Wipro
Cognizant	IBM	Publicis Sapient	Zensar Technologies
Deloitte	INETUM	Pump	Zones
DigitalOcean	Infosys		

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

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, 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 AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs 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.

ISG Provider Lens™

JUNE, 2024

REPORT: MULTI PUBLIC CLOUD SERVICES