

Multi Public Cloud Solutions

A research report comparing vendor strengths,
challenges and competitive differentiators



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Enterprises are swiftly embracing cloud-native technologies and advanced technical tools across varied cloud environments, including on-premises, multicloud, hybrid and edge solutions. This strategic approach guarantees consistent performance, scalability and security while optimizing resource utilization and cost efficiency. By boosting operational agility and innovation potential, organizations are transforming cloud-native application development, deployment and management.

In the evolving IT landscape, cloud-native observability and security solutions have become essential for monitoring and safeguarding applications within microservices architectures. These tools provide comprehensive visibility, security and control across all infrastructure layers. By leveraging advanced analytics and automated responses to detect anomalies, manage dependencies, enhance application efficiency and address real-time security threats, thus maximizing the reliability and protection of modern, distributed applications.

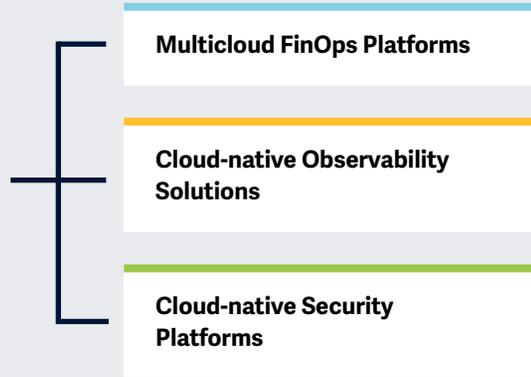
Generative AI (GenAI) is gaining significant traction within cloud-native infrastructure and microservices as enterprises increasingly harness its capabilities to boost productivity, streamline operations and unlock innovation opportunities. Businesses anticipate GenAI and security to be seamlessly integrated into their systems, becoming intrinsic components of their operational frameworks. The focus on AI integration aims to complement and enhance cloud-native technologies' functionality, driving further operational efficiency and business growth advancements.

Enterprises are embracing cloud cost management-tailored FinOps strategies to optimize the returns on cloud investments. FinOps champions financial accountability and operational efficiency by enabling real-time monitoring and controlling cloud expenditures. This planned approach allows superior resource allocation and harmonizes cloud usage with business goals, fostering cost-effective and scalable cloud operations.



This study focuses on what ISG perceives as most critical in 2024 for **cloud-native** functionalities and **FinOps** strategies.

Simplified Illustration Source: ISG 2024



The ISG Provider Lens™ Multi Public Cloud Solutions 2024 study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant vendors
- A differentiated positioning of technology providers by segments on their competitive strengths and portfolio attractiveness
- Focus on the global 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 the information from these reports to evaluate their current vendor relationships and potential engagements.



Multicloud FinOps Platforms

Definition

This quadrant assesses ISVs that offer dedicated/proprietary platforms and solutions for cloud financial management across multiple public clouds. These vendors inherently aim to help clients across various functional teams and business lines and support stakeholders in maintaining financial accountability for their cloud services. Maintaining accountability involves defining shared cost responsibilities across businesses, IT teams and the finance department. Cloud FinOps experts are responsible for managing variable costs and the usage of cloud services. They require FinOps platforms that allow them to report on cost and usage, allocate the costs to appropriate stakeholders/users and optimize both usage and price models. These platforms also enable recommending engineering changes that would provide value and continuously assessing the effective use of cloud services in lieu of budgets and business objectives.

This quadrant assesses vendors that offer cloud FinOps as a standalone solution and sell it as a license or any other standard pricing model. Vendors can leverage AI and ML technologies to analyze usage patterns, forecast consumption trends and subsequently recommend the right public cloud resources to optimize costs.

Eligibility Criteria

1. **Report** and **optimize** cloud costs tailored to the needs of various units, such as finance, IT and business, based on similar data sources and through a **single console**
2. Offer a **single interface** for multiple public cloud infrastructure providers and other tools to **collaborate** and combine data via **APIs**
3. **Search** and **identify** irregularities and **eliminate** underutilized services
4. Allocate **shared costs** for shared resources, functions or services and **track** them to create a business case with actionable financial insights
5. **Forecast** to better plan cloud **expenditures**, with the ability to conduct cost-trend and **benchmarking** analyses
6. Present a **centralized, commitment-based** cloud infrastructure buying process and ensure **transparency** in **reporting** and optimizing costs
7. Offer FinOps **support** for **multicloud** environments
8. Influential **FinOps Foundation accreditation**



Cloud-native Observability Solutions

Definition

This quadrant assesses software vendors that provide dedicated/proprietary platforms and solutions for cloud-native observability (logging, tracing and measuring) of containerized applications and infrastructure. Cloud-native observability vendors offer capabilities to help enterprises understand their inner workings and predict the application environments' performance through in-depth monitoring. These typically include metrics generated by containerized infrastructure, microservices applications and business services through dashboards and alerts. These vendors also leverage AI and ML technologies to help predict future incidents and proactively resolve them. Understanding the behavior of applications and the disparate assets on multicloud and hybrid cloud environments has become more complex, especially in the case of a traditional monolith application. Users can collect telemetry data from different locations and analyze it to generate meaningful insights. IT teams must ensure high observability in the cloud environment

when reading data flows and system logs. Developers and operators must understand the behavior of each containerized application or its associated service, including how they communicate with one another. Historically, vendors developed standard monitoring tools without considering the probable failure of cloud-native applications to provide the necessary information to enterprises. Hence, a paradigm shift from host-based monitoring to container- and orchestrator-level monitoring is the cloud-native standard to ensure optimum performance and round-the-clock data availability. Also, enterprises leverage observability platforms to get proactive insights into various dependencies among cloud-native assets, capacity planning and root cause analysis using AI and ML technologies.

Eligibility Criteria

1. Provide dedicated tools for **observability**, specifically **multi-container** applications, with support for highly granular **microservices architecture** and applications comprising a small number of complex services
2. Possess the capability to work **across multiple infrastructure** environments under a **hybrid cloud** model
3. Establish a **strong connection** between the solution's **business model** and enterprise **outcomes**, such as financial and performance benefits
4. Leverage observability **pipeline tools** to better manage and forward critical observability data
5. Provide robust observability support for **service mesh** to monitor and manage a wide array of **microservices**
6. Leverage **AI** to **reduce noise** by filtering **alerts** based on context and significance



Cloud-native Security Platforms

Definition

This quadrant assesses ISVs offering dedicated/proprietary platforms and solutions for securing infrastructure and applications in a cloud-native environment — from application development to production and runtime. Traditional monolithic security tools are incompatible with the cloud-native environment's elastic, distributed and dynamic nature. The cloud-native applications in this environment are disseminated across multiple locations (both multicloud and hybrid) and continually created and updated by multiple users and developers. Cloud-native security vendors typically offer a unified platform, providing visibility of the orchestration and container network environment. They provide features such as scans for detecting vulnerabilities, interpreting anomalies and misconfigurations during development and at runtime, topology maps, AI-enabled risk assessment, micro-segmentation of the container environment and auto generation of network policies. The policies include least-privilege access, regulatory compliance monitoring and validation, and identity and

access management. The ISVs cover the entire CI/CD lifecycle and integrate with DevOps workflows to seamlessly secure infrastructure and application layers. Additionally, these cloud-native security platforms, infused with AI and ML technologies, are extensively leveraged to automate the threat mitigation process by analyzing and prioritizing severity and potential impact-based security alerts.

Eligibility Criteria

1. Offer a **unified platform** covering infrastructure and applications compatible with **multi** and **hybrid-cloud** environments
2. **Integrate third-party** data sources and open-source cloud-native **security** software
3. Offer unified **visibility** for **DevSecOps**, including intelligent container image **screening** integrated into CI/CD pipelines
4. Block **unscanned** or **vulnerable** images
5. Adopt **AI** and **ML** for intelligent **discovery** of container **topology** and **automated** remediation
6. Enable robust **IAM** features, including automated least-privilege management and network policies, password management and **zero trust** boundaries
7. Apply **AI** and **ML** to identify potential security breaches while **monitoring network traffic** in **real time**
8. Offer out-of-the-box mapping to major **regulatory compliance** controls such as **GDPR, PCI DSS** or **HIPAA**
9. Have relevant **certifications** for cloud-native security such as **CNCF, GIAC** and **CCSP**



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following seven quadrants on Multi Public Cloud Solutions 2024.

Quadrant	Global
Multicloud FinOps Platforms	✓
Cloud-native Observability Solutions	✓
Cloud-native Security Platforms	✓



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

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

The ISG Provider Lens 2024 – Multi Public Cloud Solutions 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.

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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.



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Data Analyst



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 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 Advisors to this study



Anay
Nawathe

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.

AlgoSec	CloudVane	Exivity	IBM (Turbonomic)
Anodot	Cloudwize	Fairwinds	IBM Instana
AppDynamics	CloudZero	Finout	Infracost
Apptio (Cloudability)	ControlPlane	Flexera	KubeCost
Aqua Security	Coralogix	Fortinet	Lacework
Centilytics	Corestack	Giant Swarm	Logic Monitor
Check Point	Crayon	Grafana	Logz.io
Chronosphere	Cribl	Harness	MeshIQ
Cisco	CrowdStrike	HCLSoftware (MyXalytics)	Moogsoft
Clockwork.io	DataDog	HCLTech (MyXalytics FinOps)	Morpheus Data
Cloud Foundry (Twist lock)	Densify	Hitachi Vantara	Neos (CloudVane)
CloudBolt	DoiT	Honeycomb	NetApp (Cloud Insights)
CloudDefense.AI	Dynatrace	Hystax	NetApp (Spot)
Cloudeasier (Accenture)	Economize Cloud	IBM	New Relic
Cloudthread	Elastic	IBM (Turbonomic + Nordcloud)	Nordcloud



Invited Companies

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Orca Security	Snyk (Fugue)	Tenable	Yotascale
Palo Alto Networks	SoftwareONE	Ternary	Zabbix
Pier Cloud	Solarwinds	Thebes	Zscaler
PingSafe	Sonatype	Tigera	
ProsperOps	Sophos	Traefik Labs	
Qualys	Splunk	Trellix	
Red Hat	Stacklet	Trend Micro	
Riverbed	Stackstate	Uptycs	
Rudder	StormForge	Vantage	
Samsung SDS	Strategic Blue	Vega Cloud	
Sematext	Sumo Logic	Veracode	
ServiceNow	SUSE (Rancher)	Virtasant	
Singularity Cloud	SUSE NeuVector	VMware	
Skyhawk Security	Synk (Fugue)	VMware (CloudHealth)	
Skyhigh Security	Sysdig	Wiz	



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™

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

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ISG

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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.



JUNE, 2024

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