

A collage of several skyscrapers with glass facades, viewed from a low angle looking up. The buildings are arranged in a staggered, overlapping pattern, creating a sense of depth and architectural complexity. The colors range from cool blues and greys to warmer yellows and oranges.

***ISG** Provider Lens™

2022

Public Cloud - Solutions &
Services 2022

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 800 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, Connecticut, 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.



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Definition

With the transition to the endemic stage, enterprises are rapidly increasing their investments in digital transformation engagements leading to an exponential rise in public cloud adoption. Other key reasons for this move are a higher emphasis on cybersecurity, greater push towards IT cost optimization and operational efficiency, and increased deployment of automation tools for data management. The growing maturity of public cloud infrastructure providers has had a major impact on both enterprises and IT service providers, with both buyers and consumers witnessing a significant shift in sourcing services, from physical hardware to digital applications/platforms. For enterprises, this has also impacted business models that require digital initiatives and aim to address governance, risk and compliance norms. Given the widespread adoption of the as-a-service model, enterprises should continuously evaluate cloud service providers on a global level mainly due to growing security concerns and the dynamic nature of the business landscape. They 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). These providers will continue to manage workloads on an on-going basis and help enterprises control, optimize and manage cloud expenses through frameworks such as FinOps.

ISG reports a strong demand for digital transformation engagements and cloud-based XaaS solutions which, in turn, is driving global contracts for cloud products and services, including infrastructure-as-a-service (IaaS), software-as-a-service (SaaS) and platform-as-a-service (PaaS). According to ISG 1Q 2022 ISG Index™ figures, the global market has grown 31 percent in combined market annual contract value (ACV) to reach its current value of US\$24 billion year over year, while the XaaS ACV has increased by 43 percent to reach US\$15.6 billion in the same period. Also, the IaaS spending grew by over 50 percent to reach US\$11.7 billion, while the SaaS market grew by 22 percent to reach US\$3.9 billion.

The ISG Provider Lens™ study offers IT decision makers:

- A differentiated positioning of providers based on competitive strengths and portfolio attractiveness
- Focus on different markets, including the U.S., the U.S. public sector, Germany, Switzerland, the U.K., Nordics, Brazil, Australia, France and global geographies

ISG studies serve 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.

Quadrants Research

As a part of this ISG Provider Lens™ quadrant study, ISG includes the following quadrants on Public Cloud - Solutions and Services:

Simplified Illustration

Public Cloud – Services and Solutions 2022	
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 2022

Consulting and Transformation Services

This quadrant assesses service providers or service integrators that offer consulting and transformation services for enterprise public cloud engagements in the context of their digital transformation. Participating service providers have partnerships with public cloud infrastructure providers to offer ideation for multicloud programs and industry cloud solutions and manage customer-specific complexities in the adoption and deployment of public cloud solutions. These providers have highly skilled developers and software architects who leverage design thinking, SCRUM initiatives and short work cycles to meet the growing customer demands. This quadrant evaluates providers that help enterprises modernize, optimize, and transform their business operations to increase efficiency, agility, and security. Hyperscale cloud partners leverage platform-specific best practices to maximize and optimize the value of existing and new investments.

Provider services typically include the following:

- **Consulting services:** Consultants design a business case for multicloud environments, and they assess workloads for migration. They also build a transformation roadmap for addressing risk, security and compliance issues and advise on migrating applications from the existing environment to a public cloud.
- **Transformation services:** Cloud experts are involved in designing and building multicloud architectures or environment. They also offer support for migrating and integrating 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 have become a mainstream requirement from a CXO perspective, 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 other techniques) in conjunction with cloud-native application development for greenfield and brownfield workloads
- Hyperscale-related partner program certifications
- Competence in at least two hyperscalers (preferred providers – AWS, Azure and GCP)
- Offers API libraries for application and service integration in public cloud
- Ability to drive governance, risk and compliance for large transformation programs
- Help clients with their carbon neutral strategies and help them understand benefits of a green strategy, by leveraging proprietary platforms
- 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 on public cloud infrastructure such as AWS, Microsoft Azure, Google Cloud Platform. They adopt a DevOps and DevSecOps-centric approach to help enterprises 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 (SRE) and business resiliency.

Broadly, these services include cloud services lifecycle management, real-time and predictive analysis, and monitoring and managing of a customer's public and multicloud environments, with the aim to maximize the performance of workloads in the cloud, reduce costs and ensure compliance and security. Typically, 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 technical services, a provider offers cloud optimization capabilities through the FinOps approach and leverages FinOps frameworks to analyze and forecast financial impacts plus propose optimization of cloud resource consumption by bringing in stakeholders from various departments such as engineering or IT, finance, procurement, line of business and executive management.

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, virtual machines and container services
- Automated upgrade services for operating system, middleware and applications on public cloud infrastructure
- Hybrid cloud infrastructure management platform for cloud-cost management (charge back and show back), identity management, FinOps and IT service management
- Monitoring, logging, patching and predictive analytics services to improve 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
- Expertise in managing configuration and integration of platforms and systems as well as 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
- Industry specific solutions and practice knowledge of managing workloads on public cloud infrastructure

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 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, business process management, collaboration networks, databases, analytics and machine learning 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 (ISVs) 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
- Support sovereign cloud mandates for governance and data transparency requirements
- 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 machine learning 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 that are best suited to host SAP's software portfolio, with an 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. The tools required can be a part of standard IaaS offerings or are provided by partners in a marketplace.

The cloud infrastructure provider should also offer 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 to include servers, storage and connectivity specific to the SAP product line
- Memory capacity to 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 covers 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 analyzes prominent features of collaboration services, which are being covered in the 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; compatibility with popular office suites and file systems such as FAT32, NTFS and Ext (4) plus integration with third-party software
- File recovery and rollback capabilities for version tracking with a 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, 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	Australia	Brazil	France	Germany	Nordics	Switzerland	U.K.	U.S.	U.S. Public Sector
Consulting and Transformation Services		✓	✓	✓	✓	✓	✓	✓	✓	✓
Managed Public Cloud Services		✓	✓	✓	✓	✓	✓	✓	✓	✓
Hyperscale Infrastructure and Platform Services		✓	✓	✓	✓	✓	✓	✓	✓	✓
SAP HANA Infrastructure Services		✓	✓	✓	✓	✓	✓	✓	✓	✓
Cloud FinOps Platforms	✓									
Secure Enterprise Filesharing Services					✓					

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-generation 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

Schedule

The research phase falls in the period between **July and September 2022**, during which survey, evaluation, analysis, and validation will take place. The results will be presented to the media in **December 2022**.

Milestones	Beginning	End
Launch	June 24, 2022	
Survey Phase	June 24, 2022	July 22, 2022
Sneak Preview	October 2022	
Press Release	December 2022	

Please refer to [this link](#) below to view/download the ISG Provider Lens™ 2022 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!

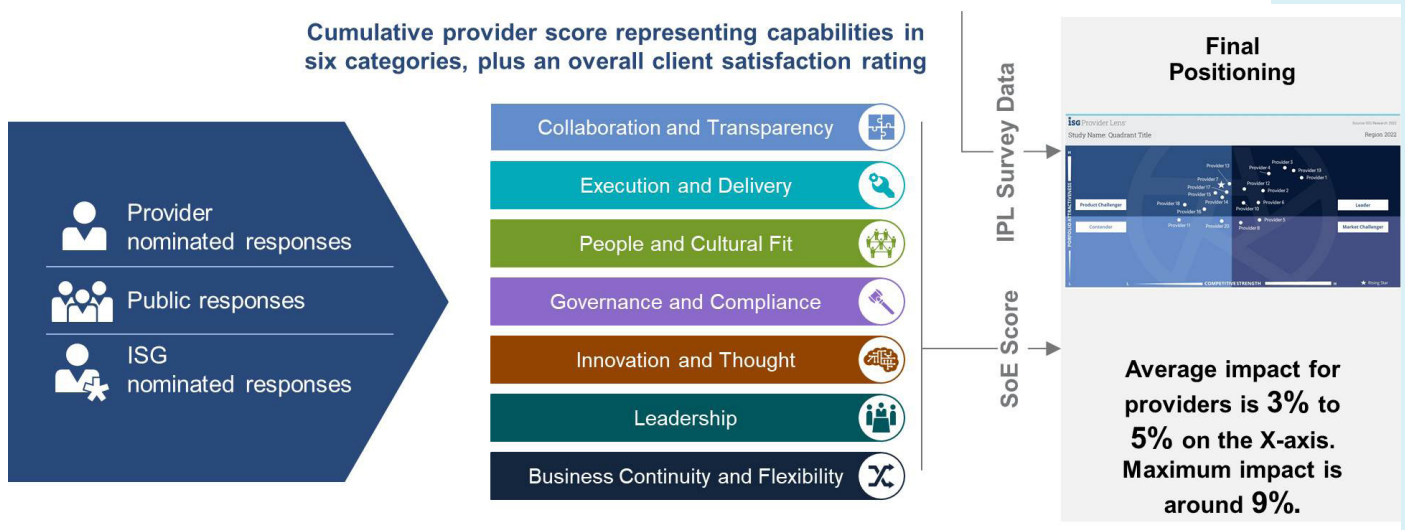
Research Production Disclaimer:

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 work identified by the 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 to 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 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: Star@isg-one.com.

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	Avectris (Aveniq)	CloudBolt
3stepIT	Axians	CloudCheckr
7P	Baggenstos	Cloudeasier
Abraxas	BearingPoint	CloudHealth (VMware)
Accenture	Bechtle	Cloudreach
Acora	Be-Cloud	CloudSigma
Adacor	Birlasoft	Cloud Target
adesso	BitHawk	Cloudwiry
ADLON Intelligent Solutions GmbH	Blueshift	Cloudwize
Aiven	BMC Software	Coforge
Alfresco	BMISX	Cognizant
Alibaba	Box	Columbus
All for One Group	Brainloop	Comline SE
AllCloud	Brasoftware	Compasso UOL
Allgeier ES	BRLink	Computacenter
Amanox Solutions	BT	Crayon
AWS	BTC	Ctera
Apalia	CANCOM	Cybercom
Apptio (Cloudability)	Capgemini	d.velop
Aquila Clouds	CenterDevice	Datadog
Arvato Systems	Centilytics	DATAGROUP
Atea	CGI	Dataone
Ativy	Citrix	Dedalus Prime
Atos	Claranet	Deloitte
Avanade	Cloud Temple	Densify

Deutsche Telekom	gridscale	Lattine
Devoteam Alegri	HCL	LINKBYNET
Devoteam Revolve	Henson Group	Logicalis
Digital Ocean	Hexaware Technologies	Logicata
direkt gruppe	HighQ	LTI
DoubleSlash	Huawei	Lumen
DRACoon	Hystax	Materna
Dropbox	IBM	Micro Focus
DXC	IBM Deutschland	Microland Limited
Econis	Infinite Computer Solutions	Microsoft
Edifixio	Infoniq	Mindtree
Eficode	Infosys	Morpheus
Embratel	Ingram Micro	Mphasis
Enfo Group	Innovations ON	msg
Ensono	INS Systems	MTF
essence IT	IONOS	Multiedro
Everyware	Iota.cloud	Navisite
Exoscale	IPNET	NetCloud
EY	IPsense	Netfiles
FCamara	IPT	Netlution
Flexera	ITCore	New Relic
Fujitsu	ITpoint Systems	Nextios
Giant Swarm	Itadel (Acquired by IT Relation)	Nine
Global Access	itera	N-iX
GlobalDots	ITESYS	Nixu
GlobalLogic	KAMP	NNIT
Globalweb	KPMG	Node4
Google	Kreuzwerker	Noris Network
GRASS-MERKUR	KubeCost	NTT DATA

oneadvanced	ScaleUp Technologies	Teltec
Opsani	Senacor	Ternary
Oracle	Sentia	ti&m
Orange Business Services	Servent	ti8m
OVH	ServiceNow	TietoEVRY
ownCloud	SGA Tecnologia	TIVIT
oXya	Skaylink	TO THE NEW
Persistent	Sky.One	Trasnputec
Pileus Cloud	SoftwareONE	Trianz
Pinja	Solita	Trivadis
PlusServer	Solteq Plc	T-Systems International
Proact IT UK Limited	Somnitec	UMB AG
ProCloud	SONDA	Unisys
Protera	Sopra Steria	UST
PwC	SOU.Cloud	V8 Consulting
Pythian	Splunk	ValueLabs
QSC	Spot by NetApp	Virtusa
Rackspace	Stack Labs	Virtustream
ratiokontakt	Stefanini	Visolit
Red Hat	Strato	Vodafone
Release 42	Swisscom	VPN
Reply	Syntax	VSHN
Safe Host	TCS (Tata Consultancy Services)	Wagner
SantoDigital	TeamDrive	Wipro
SAP	Tech Mahindra	Zensar
Scale Squad	Tecracer	

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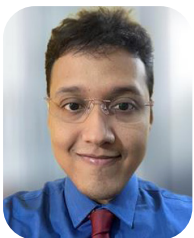
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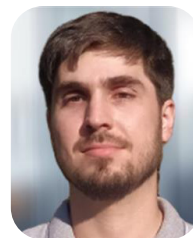
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ISG Provider Lens QCRT Program Description

ISG Provider Lens™ offers market assessments by incorporating practitioner insights, reflecting regional focus and conducting 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 & Consistency Review Team (QCRT) that ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. 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 providers inclusion, participate in briefing calls
- Give their perspectives on service provider ratings and review report drafts

The ISG Provider Lens QCRT program helps round out the research process, supporting comprehensive research-focused studies.

Quality & Consistency Review Team for this study



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Do you need any further information?

If you have any questions, please do not hesitate to contact us at isglens@isg-one.com.