ISG Provider Lens™

2022

Public Cloud - Solutions & Services 2022 – U.S. Public Sector 2022

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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

Public sector organizations face immense pressure to improve operations, reduce costs, and modernize for digital reality – all in a climate of uncertain funding and diminished staffing. The effective and efficient use of cloud capabilities enables such organizations to accomplish this in a sustainable and scalable manner.

This ISG Public Sector Provider Lens™ research study assesses select providers of consulting, infrastructure, and managed public cloud services to U.S. state and municipal government agencies; to public education, health, and utility providers; and to other public services organizations including non-profit, non-governmental organizations (NGOs).

ISG Public Sector Provider Lens™ research studies examine, explain and provide guidance on business software platforms, solutions, tools, services and providers that help improve how public sector organizations operate while enabling the shift to digital realities. This study assesses 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 more 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 reports also provide competitive insights for vendor and provider positioning, key relationships and go-to-market considerations.

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 user clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

Quadrants Research

The following quadrants on public cloud solutions and services are included in this study:

Public Cloud – Services and Solutions 2022	
Consulting and Transformation Services	Managed Public Cloud Services
Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services

Source: ISG 2022

Consulting and Transformation Services

This quadrant assesses service providers or service integrators that offer consulting and transformation services for U.S. public sector public cloud engagements in the context of their digital transformations. 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 clients 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 environments. 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 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:

- Depth and breadth of customer presence and involvement in the U.S. Public Sector as defined by ISG

- 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, with the preferred providers being AWS, Azure and GCP

- 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 the benefits of a green strategy, by leveraging proprietary platforms

- Migration through cloud-native application development for brownfield workloads

- 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 clients 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. The , aim is 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 use 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, and it proposes 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 systems, 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:

- Depth and breadth of customer presence and involvement in the U.S. Public Sector as defined by ISG

- 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 a 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:

- Depth and breadth of customer presence and involvement in the U.S. Public Sector as defined by ISG

- 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 or toolsets. The support analysis focuses on the vendor's service partner ecosystem and the ability to conduct related migrations and operations.

Eligibility criteria:

- Depth and breadth of customer presence and involvement in the U.S. Public Sector as defined by ISG

- IaaS to include servers, storage and connectivity specific to the SAP product line

- Memory capacity 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

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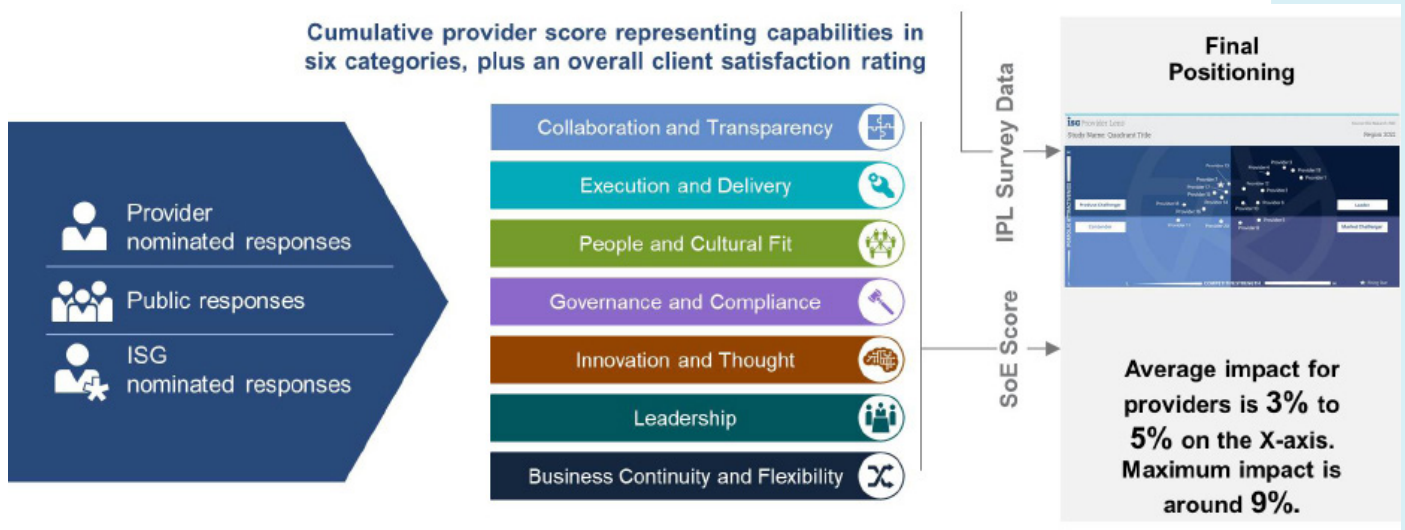
Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

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	ePlus Inc	NTT Ltd.
Accenture	Ernst & Young	Persistent Systems
AllCloud	Fujitsu	PwC
Atos	HCL	Rackspace Technology
Birlasoft	Hexaware	TCS
Blazeclan	IBM	Tech Mahindra
Capgemini	Idexcel	TO THE NEW
CGI	Infinite	Trianz
CloudHesive	Infosys	T-Systems
Cloudreach	KPMG	Unisys
Coforge	Logicalis	UST
Cognizant	LTI	Veritis
DAMCO	Lumen	Virtusa
Deloitte	Microland	Wipro
DoiT	Mindtree	XenonStack
DXC	Mphasis	Zensar
Embitel	Navisite	
Ensono	N-iX	

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ISG Provider Lens QCRT Program Description

ISG Provider LensTM 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

Alex Perry
Director

Do you need any further information?

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