



***ISG** Provider Lens™

2019

Public Cloud – Solutions &
Service Partners 2019

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 700 clients, including more than 70 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; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 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 www.isg-one.com.



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Definition

The growth of public cloud adoption by enterprises and the maturity of the cloud industry are creating a major impact on organizations, both enterprises and IT service providers, and on business models, requiring increased market adaptation and creating risks of obsolescence. Considering the widespread adoption in the as-a-Service area, enterprises must continuously evaluate cloud service and IT providers on a global level.

ISG reports the continual strong demand for digital transformation is driving global contracts for cloud products and services including Infrastructure-as-a-service (IaaS) and platform-as-a-Service (PaaS). The ISG Index™, which tracks global commercial contracts, recorded annual contract value (ACV) of \$13.5 billion in Q1 2019, an increase of 12 percent from the previous quarter. These global numbers include as-a-service and traditional sourcing by large enterprises. Global combined market ACV rose 12 percent year over year, fueled by robust IaaS market. The massive growth numbers in the as-a-Service area indicates the continual shift and momentum to digital technologies in order to lower costs, increase developer productivity, improve responsiveness to business requirements, improve service to end users, and ultimately drive innovation.

The ISG Provider Lens™ study offers IT-decision makers:

- Strengths and weaknesses of relevant providers;
- A differentiated positioning of providers based on competitive strength and portfolio attractiveness;
- Focus on several markets including global, U.S., Germany, Switzerland, U.K, the Nordics, Brazil and Latin America.

Our study serves as an important decision-making basis for positioning, key relationships, and go-to-market considerations. ISG advisors and enterprise clients also leverage information from these reports in evaluating their current vendor relationships and potential new engagements.

Quadrants by Region

As part of the ISG Provider Lens™ Quadrant Study, we are introducing the following quadrant (market) research on Public Cloud – Solutions & Service Partners 2019 by region:

Quadrants	Global	USA	Germany	CH	UK	Nordics	Brazil	LATAM	Europe	ANZ
Public Cloud Transformation Services	✓	✓	✓	✓	✓	✓	✓	✓	CPQ	CPQ
Managed Public Cloud Services	✓	✓	✓	✓	✓	✓	✓	✓	CPQ	CPQ
Managed Public Cloud Services for AWS	CPQ	✓	✓	CPQ	✓	✓	✓	✓	CPQ	CPQ
Managed Public Cloud Services for Azure	CPQ	✓	✓	CPQ	✓	✓	✓	✓	CPQ	CPQ
Managed Public Cloud Services for GCP	CPQ	✓	✓	CPQ	✓	✓	✓	✓	CPQ	CPQ
PaaS - Application Development Platforms as a Service	✓	✓	✓	CPQ	✓	✓	✓	✓	CPQ	✓ CPQ
IaaS - (Hyperscale) Infrastructure as a Service	✓	✓	✓	✓	✓	✓	✓	✓	CPQ	CPQ

*CPQ = Candidate Provider Qualification

Note: We have highlighted some regions that do not have a quadrant report. The data for these regions is being collected for the Candidate Provider Qualification (CPQ) program.

Public Cloud Transformation Services

Public cloud enables enterprises to achieve agility and scalability without having to invest into their own infrastructure, making it an integral and important catalyst for digital transformation. Consulting and Implementation service providers partner with public cloud providers to manage the customer-specific complexity of adopting and deploying public cloud solutions. Their services typically include the following:

- Consulting services: Designing a business case for cloud, identifying workloads for migration, building a transformation roadmap, which includes assessing organizational impact, addressing risk and compliance issues and advising on migrating applications from the existing environment to a public cloud provider.
- Implementation services: Architecting and building the cloud environments, migrating and integrating applications and optimizing the architecture to exploit the cloud computing features and benefits.

For this quadrant, we exclude the creation of private clouds, as they are covered in a separate study on Private/Hybrid Cloud Data Center Service & Solution Providers. Accordingly, the Public Cloud Transformation Consulting & Migration quadrant is confined to the adoption of public cloud services and their integration with on-premises environments, which can include private clouds.

Eligibility criteria:

- Public cloud transformation thought leadership and image;
- Methods and frameworks to analyze the client situation;
- Experience within the planning and implementation of multi-cloud services;
- Application migration experience (templates, automation engines and ISV partnerships);
- Hyperscale provider related partner program certifications from solutions standpoint;
- Vertical (industry) and horizontal (technology) specific competence;
- Client references and projects or use cases;

Managed Public Cloud Services

Managed public cloud services providers (MSPs) provide professional and managed services on top of third-party public cloud IaaS and PaaS hyperscale platforms. At a broad level, these services include provisioning, real-time and predictive analysis and monitoring and operational management of the customer's public and also multi-cloud environment, aiming to maximize the performance of workloads in the cloud, reduce costs and ensure compliance and security. Typically, specially developed or licensed cloud management platforms and tools are used to serve customers with the maximum amount of automation and to provide the necessary transparency about the managed cloud resource pool in terms of capacity utilization and costs, including self-service administration.

Services provided typically include:

- Professional services for the management and monitoring of CPU, storage, memory, databases, operating systems as standalone or micro services or virtual machine and container services;
- Operation system, middleware and application upgrades and patching services;
- Service portal for expense management (charge back and show back) and identity management or IT service management;
- Governance and compliance management;
- 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 multi-cloud environments;
- Expertise in configuration management of platforms and systems as well as containers;
- Support for software code development, cloud-native and legacy system integration;
- DevOps, API enabled automation and cloud analytics experience;
- Mature security processes;
- Support for different client roles such as technicians (IT) and developers;
- Partnerships with relevant public cloud providers and respective managed service provider (MSP) certificates for AWS, Azure, GCP or others.
- Typically, MSPs must show case customer cases and a certain amount of consumption-driven and recurring revenue in addition to participating in joint business planning sessions and passing multiple certifications and

audits to ensure skills and knowledge for each of these hyperscale platforms:

- Azure CSP 1 or 2 – silver, gold or expert partners: Administrator, Solutions Architect, Developer, DevOps / Security / AI / Data Engineer, domain specialization and Cloud Platform;
- AWS registered, advanced, or premier partners: Solution Architect, DevOps Engineer, Developer, SysOps Administrator, Migration Consulting/Delivery, domain specialization;
- GCP registered, premier partners: Cloud Architect, Data Engineer, DevOps competency, domain specialization.

PaaS – Application Development Platforms

Platform as a Service (PaaS), usually located between the SaaS and the IaaS layer, is a solution-oriented environment that offers multiple micro-services and runtime engine for cloud-based application test and development processes that typically addresses all lifecycle needs that a developer aims for. Services include respective middleware, persistent resources, business process management, collaboration networks, databases, analytics and machine learning functions as well as marketplaces for distribution purposes. Furthermore, PaaS providers support and guide independent software vendors (ISVs) in their go-to-market and provider financial and marketing support.

Eligibility Criteria:

- Innovative portfolio of platform services (middleware, databases, runtime environments etc.);
- Elastic data center infrastructure (persistent resources) or partnerships around the globe;
- Sophisticated test and development options (languages, debugging, logging/reporting, machine learning etc.);
- Workflow support for agile development methodologies (SCRUM) and DevOps;
- Open architecture, interoperability and well documented (web service) APIs or middleware or integration layer to merge multiple clouds or services and platforms;
- Security architecture and features including Single Sign On (SSO);
- Container connection and integration;

IaaS - (Hyperscale) Infrastructure as a Service

This quadrant covers the hyperscale public cloud providers and their global as well as local offerings. The hyperscale IaaS quadrant includes companies that provides virtual compute and software on a public cloud platform that are used to build an IaaS offering. The coverage includes an evaluation of the IaaS public cloud providers' overall cloud computing investments and scale.

This also includes evaluation of the public cloud IaaS coverage in terms of availability zones and various data regulation policies across geographies. However, this quadrant does not include professional or managed services offered directly by some IaaS providers.

Eligibility Criteria:

- Innovative portfolio of infrastructure services (compute power, storage, network, backup, etc.);
- Powerful and elastic data center infrastructure around the globe;
- Enterprise integration and migration support through partnerships and solution guidelines;
- Easy access, price transparency, dynamic (usage-based) and fixed (reserved) billing models
- Industry known norms and certifications, strong data privacy commitment and sophisticated cyber security approach;
- IaaS as code and serverless computing support in conjunction with highly automated provisioning, event triggering and failover concepts;
- Container compatibility and management services to easily migrate and run applications
- Specialized partner program with a broad partner ecosystem to support local customer requests.

Schedule

The research and therefore main survey phase takes place in **June 2019**, followed by the evaluation, analysis and validation phase between July and August. Selected results will be presented to the media in **September 2019**.

You can download the questionnaire on an online platform. We will send you an invitation with an individual link and look forward to your participation!

Milestones	Beginning
Launch	June 04, 2019
Survey (questionnaire + briefing)	June 05, 2019 – July 03, 2019
Sneak previews	September 11, 2019
Content provisioning	November 06, 2019
Press release	November 13, 2019

Archetype Report

In this report, we identify and classify the typical buyers of public cloud and outsourcing services (managed and transformation services), which nowadays look for transformational capabilities, cost reduction and innovation. We have identified five major segments of buyers:

- **Traditional outsourcers** – buyers that focus primarily on cost reduction and seek outsourcing/staff augmentation assistance for basic monitoring activities;
- **Managed services** – buyers looking 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;
- **Highly Regulated** – buyers that have significant compliance and security requirements.

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 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 Awards™ 2019 – Call for nominations

We are excited to bring to you the 2019 ISG Star of Excellence Awards™.

The ISG Star of Excellence Awards™ serves as an industry beacon for service excellence – a true north star for enterprise clients that want to know, and engage with, the best of the best.

As a leading technology research and advisory firm known for its unbiased, independent research and advice, ISG is uniquely positioned to lead the initiative.

This year, we have made few changes and enhanced our approach to this award. We have also added to the Star of Excellence Award™ – the Star of Excellence Emerging Technology Award™ designed to recognize providers that incubate, enable and accelerate modern technologies (blockchain, big data, machine learning/AI and IoT) for their clients.

The refreshed approach to the ISG Star of Excellence Awards™ includes a very strong focus on internal ISG, provider, industry association and enterprise educational marketing.

To ensure your selected clients compete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence website www.isgstar.isg-one.com

Please get your nominations in early, to allow your clients the maximum time to submit their feedback. As we highlighted during the webinar, all submissions must be received before midnight U.S. Eastern time on July 15, 2019.

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

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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.

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.

*um (unbelievable machines)	Atmosfera	Cloudeera
2nd Watch	Atos	Cloudreach
7P	Avanade	Codeless Platforms
Abraxas Informatik	AWS	Cognizant
Acceleris	Axians	Comicro
Accenture	BearingPoint	Comparex/SoftwareOne
Acentrix	Bechtle	Computacenter
Acommit	Bechtle Steffen	Cornerstone
ACP	beck et al.	d.velop
Action	Bison ITS (BitHawk)	Data One
Actindo	Box	Dedalus Prime
Adaptris	Brainloop	Dell EMC
ADITO	BRLink	Deloitte
Adlon	BT	Deutsche Telekom
AGIBA IT Services	CA Technologies	Devoteam Alegri
Alegri	CANCOM	Digital Ocean
Alfresco	Capgemini	Dimension Data
Alibaba	CAS Software	Direkt gruppe
All for One Steeb	CenterDevice	Dropbox
AllCloud	CentralServer	Dunkel
Allgeier	CenturyLink	DXC Technology
Allgeier ES	CGI	Econis
Alvaronic	Citrix	ECS Europe Limited
AppSphere	Claranet	Epicor
Arvato Systems	Cloud Elements	EveryWare

Exact Software	Mandic	PwC
ExcelRedstone (Commensus)	Materna	QSC
Faction	Mendix	Rackspace
Flexential	Micro Focus	Ratiokontakt
Freudenberg IT (FIT)	Microland	ReachOut
Fujitsu	Microsoft Azure	Red Hat
GDT	Mindtree	Redcentric Solutions Limited
Google Cloud Platform	Mphasis	Rey Informatik
Haufe-Lexware	MTF Schweiz	root360
HCL	MuleSoft	Sage
Heroku	NaviSite	Salesforce
HubSpot	Netcloud	SAP
IBM	Netsuite	Scheer E2E
IFS	Nexinto	Scopevisio
INAP	Nine Internet Solutions	ServiceNow
Infinite	Nordcloud	Sky.One
Infor	NTT DATA	SnapLogic
Informatica	NTT Inc.	Softtek
Infosys	Oracle	Software AG
Iomart Group PLC	OutSystems	SoftwareOne
IPsense	OVH	Sopra Steria
Itrix	ownCloud	Stefanini
Jitterbit	Pegasystems	STRATO
Joyent (Triton)	Penso	Stratoscale
KPIT	Pivotal	Sungard
Lake Solutions	PlusServer	SUSE
LTI	ProfitBricks (1&1 Ionos)	Swisscom

Talend	UST Global
TCS	Virtusa
Tech Mahindra	Virtustream
Tecnocomp	Vodafone
tecRacer	VSHN
Teledata	Wagner
Telekom Deutschland	Wipro
Tibco (Scribe)	Workato
Tierpoint	Workday
TIVIT	Yash Technologies
Trianz	Zayo
T-Systems	Zensar
UKCloud	
UMB	
Unisys	
UOL Diveo	