



***ISG** Provider Lens™

2020

Public Cloud – Solutions
& Services 2020

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 75 of 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 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.



Table of Contents

Definition	4
Quadrants Research	5
Quadrants by Region	11
Archetype Report.....	12
Schedule.....	13
Partial list of companies being invited for the survey	14
ISG Star of Excellence Awards™ 2020 – Call for nominations	18

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Definition

The growth in public cloud adoption among enterprises and the maturity of the cloud industry are creating a major impact on both enterprises and IT service providers and on business models, requiring increased acceptance of digital initiatives and creating risks of obsolescence. Considering the widespread adoption of the as-a-Service model, enterprises need to continuously evaluate cloud services and IT providers globally.

ISG reports that the 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). According to the latest 1Q20 ISG Index™, the global market has grown 7 percent in combined market annual contract value (ACV) to reach its current value of \$14.8 billion since Q4-2019, while the as-a-service ACV has increased by 11 percent to reach \$7.9 billion since the same period. Also, the IaaS market grew 18 percent to \$5.9 billion and SaaS market dropped by 4 percent to \$2 billion. The growth in numbers in the as-a-Service area indicates the shift to and preference for digital technologies to reduce costs, increase productivity, improve responsiveness to business requirements, improve service to end users and ultimately drive innovation.

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

- Strengths and weaknesses of relevant providers
- A differentiated positioning of providers based on competitive strength and portfolio attractiveness
- A perspective on several markets, including global, the U.S., the U.K., Germany, Switzerland, France, the Nordic Countries, Brazil.

This study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also leverage information from these reports to evaluate current vendor relationships and potential engagements.

Quadrants Research

As part of this quadrant study, ISG is introducing the following six quadrants on public cloud solutions and services:

Simplified illustration

Public Cloud – Solutions and Services 2020	
Consulting and Transformation Services (CATS)	Governance, Risk and Compliance Services
Managed Public Cloud Services	Secure Enterprise Filesharing Services
Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services

Source: ISG 2020

Consulting and Transformation Services (CATS)

Public cloud enables enterprises to achieve agility and scalability without investing in their own infrastructure, thus making it an integral aspect of digital transformation. Consulting and transformation service providers partner with public cloud providers to manage customer-specific complexities of adopting and deploying public cloud solutions. Their services typically include the following:

- Consulting services: Designing a business case for cloud; assessing the workload for migration; building a transformation roadmap, which includes addressing risk and compliance issues; and advising on migrating applications from the existing environment to that of a public cloud provider.
- Transformation services: Designing and building the cloud architecture/environments, migrating and integrating applications and optimizing the architecture to harness 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 Next-Gen Private/Hybrid Cloud Data Center Service & Solution Providers. Accordingly, the Public Cloud Consulting and Transformation quadrant encompasses 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
- Methods and frameworks to analyze the client IT landscape
- Experience in the planning and implementation of multi-cloud services
- Application migration experience (templates, automation engines and independent software vendor (ISV) partnerships)

- Hyperscale provider-related partner program certifications from the solutions standpoint
- Vertical (industry) and horizontal (technology) specific competency
- Client references and projects or use cases
- Hybrid cloud integration and support services

Governance, Risk and Compliance Services

In this quadrant, service providers such as consulting firms offer various frameworks, policies, processes and functions to ensure enterprise cloud workloads are run in a secure and compliant environment, regardless of the location. Therefore, a framework and a set of policies, for the use of cloud computing services in a secure environment, are needed and often flanked by public cloud transformation activities. Relevant providers are third-party independent organizations that offer unbiased governance, risk and compliance (GRC) services. To successfully implement cloud solutions, it is necessary to focus on the business architecture, by taking into account the business case, cloud operating model, vendor evaluation and selection, readiness and maturity of the entire ecosystem. Key services include organizational change management (OCM), stakeholder's awareness and responsibilities alignment, application migration, cloud innovation lab establishment, security, tax, audit and finance risk-assessment to make the public cloud service usage fully compliant with regional and industry specific regulations.

Eligibility Criteria:

- Ability to align technology requirements with business goals (new products, reduction in time to market and increase profitability)
- Should be able to offer optimization at an operational level through governance policies (optimize service availability, minimize stakeholders' specific risk, reduce dependency on legacy application stacks)
- Ability to provide governance architecture from the time of inception for future growth and easy service integration
- Should adhere to security certifications such as HIPAA, GDPR, BSI C5, SOC, NIST, ISO, PCI DSS, FISMA, ANSSI, FedRAMP, etc.
- Experience in defining and, above all, in mapping custom policies and organizational structure, including clear roles and responsibilities, with new requirements
- Perform cloud audits and services like cloud security posture management (CSPM) for a broad spectrum of cloud environments
- Perform accounting, tax and legal procedures in cloud transformation projects to mitigate risk

Managed Public Cloud Services

Managed public cloud services providers (MSPs) provide professional and managed services atop third-party public cloud IaaS and PaaS hyperscale platforms. Broadly, these services include provisioning, real-time and predictive analysis and monitoring and operational management of a customer's public and multi-cloud environment, with the aim 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 maximum automation and provide the necessary transparency on 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, and operating systems as standalone or micro services or virtual machine and container services
- Operation system, middleware and application upgrade 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.

**Note: For Brazil and France region, this quadrant will have additional subset quadrants, namely, Managed AWS Services, Managed Azure Services and Managed GCP Services.*

Eligibility criteria:

- Operational excellence and well-defined professional services
- Experience in building and managing public and multi-cloud environments
- Expertise in managing configurations of platforms and systems as well as that of 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.

Hyperscale Infrastructure & Platform Services

This quadrant is aimed at suppliers that provide virtual compute resources, middleware and software on a public cloud. Clients consume Infrastructure and Platform (Micro) Services as an on demand and a web-centric service. Typical services in the IaaS segment are compute services, storage and network resources, where all are provided in virtual or containerized software-defined fashion and rounded up by serverless architectures. The hyperscaler PaaS segment offers multiple micro-services and runtime engines for pre-defined cloud-based application development processes that typically address full life cycle needs for a developer that needs to build or modernize applications. Services include middleware, persistent resources, business process management, collaboration networks, databases, analytics and machine learning (ML) capabilities. Internal and external (third-party services) are also being made available through marketplaces. In addition, IaaS or PaaS vendors support and manage ISVs in their go-to-market activities.

Eligibility criteria:

- Innovative portfolio of infrastructure services (computing power, memory, network, backup, etc.) and container management functions
- Powerful and resilient data center infrastructure
- 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
- 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
- Support for multiple development tools, operating systems, technologies and platform management automations
- Workflow support for agile development methodologies (Scrum)
- Open architecture, interoperability and well-documented (web service) APIs or middleware/integration layer to join multiple clouds or services and platforms
- Specialized partner program with a broad partner ecosystem to support local customer requirements.

Secure Enterprise Filesharing Services

Cloud file sharing vendors offer enterprises a service to store and access data on a SaaS model. Functionality includes file storage of business-related documents that are accessible via a browser, desktop or mobile application. These platforms also help enterprises synchronize data both on local (on-premise) and on the cloud. File sharing as-a-service also includes a marketplace of third-party integrations, including e-mail and productivity, social media, and project management solutions.

**Note: This quadrant mostly focuses on filesharing services and does not analyze prominent features of collaboration services, which is being covered in our Digital Workplace services IPL study.*

Eligibility Criteria:

- Should be compatible with popular office suites
- Ability to provide real-time activity on files multiple stakeholders are working on
- Should offer strong administrative controls and secure access management capabilities with a single-pane-of-glass type dashboard
- Should offer robust desktop integration capabilities and offline features
- Ability to synchronize files across all connected devices such as desktops, mobile devices and tablets
- Should provide integration capabilities across operating systems such as Windows, Android, Apple MacOS and iOS. Compatibility with filesystems such as FAT32, NTFS and Ext (4)
- Should provide robust encryption of data (in motion and at rest) and offer a secure key management solution
- Should have strong file recovery capabilities
- Ability to seamlessly integrate with third-party software
- Rollback feature, allowing users to move to a previous version
- Rich file sharing functionalities such as index numbering and full text search

SAP HANA Infrastructure Services

This quadrant examines cloud infrastructures best suited to host the SAP's software portfolio, with emphasis on SAP S/4HANA workloads and large-scale HANA databases. Participating vendors offer infrastructure-as-a-service (hyperscale IaaS), including infrastructure operations, facilities, provisioning and scaling capacity, on a pay-as-you-go (PAYG) model.

IaaS tools should include data migration, system imaging, backup, restore, disaster recovery, resource usage monitoring and management dashboards. Tools can be part of the standard IaaS offering or be provided by partners on a marketplace.

The participating vendor should provide pre-sales support to help clients on the migration plan, cloud architecture, sizing and performance optimization, licensing, systems and database configuration, virtual private network configuration and third-party vendor solutions (toolset). The support analysis focuses on the vendor's service partner ecosystem to with the ability to conduct related migrations and operations. S/4HANA hosting, colocation or enterprise cloud are excluded.

Eligibility Criteria:

- IaaS includes servers, storage and connectivity specific to the SAP product line
- Memory capacity should be above 6 TBs
- Should offer an SAP IaaS certified platform
- Vendor must have direct operations or at least one authorized partner responsible or client relationship and local regulations compliance regardless of the data center location.

Quadrants by Region

Quadrants	Global	U.S.	Germany	CH	U.K.	Nordics	France	Brazil
Consulting and Transformation Services (CATS)	Overview	✓	✓	✓	✓	✓	✓	✓
Governance, Risk and Compliance Services	Overview	✓	✓	✓	✓	✓	✓	NA
Managed Public Cloud Services	Overview	✓	✓	✓	✓	✓	✓	✓
Secure Enterprise Filesharing Services	Overview	✓	✓	✓	✓	✓	✓	✓
Hyperscale Infrastructure and Platform Services	Overview	✓	✓	✓	✓	✓	✓	✓
SAP HANA Infrastructure Services	Overview	✓	✓	✓	✓	✓	✓	✓

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 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 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
- **Highly Regulated** – Buyers that have significant compliance and security requirements

Schedule

The research phase is between **June and September 2020**. During this period, survey, evaluation, analysis and validation will take place. The results will be presented to the media in **November 2020**.

Milestones	Beginning	End
Launch	June 8, 2020	
Survey Phase	June 8, 2020	June 26, 2020
Sneak Preview	October 2020	
Press Release	December 2020	

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!

Please [refer to this link to view/download](#) the ISG Provider Lens™ 2020 research agenda.

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 lead analysts.

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 from the list? Then feel free to contact us to ensure your active participation in the research phase.

*um (unbelievable machines)

2nd Watch

7P

Abraxas Informatik

Acceleris

Accenture

Acentrix

Acommit

ACP

Action

Actindo

Adaptris

ADITO

Adlon

AGIBA IT Services

Alegri

Alfresco

Alibaba

All for One Steeb

AllCloud

Allgeier

Allgeier ES

Alvaronic

AppSphere

Arvato Systems

Atos

Avanade

AWS

Axians

BearingPoint

Bechtle

Bechtle Steffen

beck et al.

Bison ITS (BitHawk)

Box

Brainloop

BRLink

Broadcom

BT

CANCOM

Capgemini

CAS Software

CenterDevice

CentralServer

CenturyLink

CGI

Claranet

Cloud Elements

Cloudera
Cloudreach
Codeless Platforms
Cognizant
Comicro
Computacenter
d.velop
Data One
Dedalus Prime
Deloitte
Deutsche Telekom
Devoteam | Alegri
Digital Ocean
Direkt gruppe
Dropbox
Dunkel
DXC Technology
Econis
ECS Europe Limited
Epicor
EveryWare
Exact Software
ExcelRedstone (Commensus)
EY

Faction
Flexential
Freudenberg IT (FIT)
Fujitsu
GDT
Google Cloud Platform
Haufe-Lexware
Hashicorp
HCL
Heroku
Hexaware
HubSpot
IBM
IFS
INAP
Infinite
Informatica
Infosys
Iomart Group PLC
IPsense
Itris
Jitterbit
Joyent (Triton)
KPIT/Birlasoft

KPMG

Lake Solutions

LTI

Mandic

Materna

Mendix

Microland

Microsoft Azure

Mindtree

Mphasis

MTF Schweiz

NaviSite

Netcloud

Netsuite

Nexinto

Nine Internet Solutions

Nordcloud

NTT DATA

NTT

Oracle

OutSystems

OVH

ownCloud

Penso

PlusServer

ProfitBricks (1&1 Ionos)

PWC

QSC

Rackspace

Ratiokontakt

ReachOut

RedHat

Redcentric Solutions Limited

Rey Informatik

root360

SAP

Scheer E2E

Scopevisio

Sky.One

SnapLogic

Softtek

Software AG

SoftwareOne

Sopra Steria

Stefanini

STRATO

Stratoscale

Sungard AS

Swisscom

Talend

TCS

Tech Mahindra

Tecnocomp

tecRacer

Teledata

Telekom Deutschland (T-Systems)

Tierpoint

TIVIT

Trianz

UKCloud

UMB

Unisys

UnitedLayer

Compasso (UOL)

UST Global

Virtusa Polaris

Virtustream

Vodafone

VSHN

Wagner

Wipro

Workato

Workday

Yash Technologies

Zayo

Zensar

ISG Star of Excellence Awards™ 2020 – Call for nominations

We are excited to bring to you the 2020 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, 2020.

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?

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