

***ISG** Provider Lens™

Public Cloud – Solutions & Service Partners

Managed Public Cloud Services

USA 2019

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:



September 2019

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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 August 2019 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.

The lead author for this report is Shashank Rajmane. The editor is Jan Erik Aase. The research analyst is Abhilash Ramadas and the data analyst is Vijayakumar Goud.



ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

For more information about our studies, please email ISGLens@isg-one.com, call +49 (0) 561-50697537, or visit ISG Provider Lens™ under [ISG Provider Lens™](#).



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- 1** Executive Summary
- 3** Introduction
- 15** Managed Public Cloud Services
- 19** Methodology

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EXECUTIVE SUMMARY

Enterprises are increasing their cloud spending every year with the growing demand for digital innovation. As per the ISG quarterly Index (2Q19), the IaaS and SaaS markets in the Americas have grown 29 percent and 12 percent, respectively. ISG has observed that public cloud spending is growing quickly due to the increase in the number of cloud workloads being migrated and operated on the public cloud and the growing usage of PaaS services by the developer community. Other prominent factors include the increase in data generation points like IoT, edge technology and cheaper internet consumption that is generating massive volumes of user data. This data is being analyzed with the help of analytics tools that are available on the cloud.

Enterprises opting for a multi-cloud setup: Enterprises have been dissatisfied with the vendor lock-in practice followed by public cloud providers as it has resulted in high costs and no room for negotiation. Additionally, the interoperability between two or more public cloud providers was also a hindrance. As enterprises started to have more than one hyperscaler and are negotiating the usage prices, the market has become more competitive. More than half of all public cloud consumers/enterprises have been using a multi-cloud environment and this trend is expected to grow further. Irrespective of the size of the business or enterprise, there are numerous benefits of a multi-cloud setup but there are barriers as well. Orchestration is difficult as it has several moving parts and a complex setup to be operated on a public cloud environment. Many users find it difficult to manage multi-cloud environments, citing complexity as one of the biggest barriers. Users are now adopting various tools to manage this complexity, but these tools have not matured fully.

Focus on optimizing cloud costs: The top priority of enterprises is to control, manage and optimize cloud expenses. Many are finding it difficult to manage the spends due to the complex and vast cloud ecosystem. Service providers are playing an important role by

helping enterprises to manage the costs efficiently. These providers have vast experience in managing cloud infrastructure and assets over many years for several customers. They also provide enterprises with a long-term option wherein they help create a roadmap that suggests whether the workload needs a lift-and-shift or should be re-architected or re-platformed for getting the best performance and reducing the costs for running the workload.

Transformation with containers: Enterprises that were ambitious about cloud migration are re-analyzing the scope and prefer to use a single provider's services for strategizing, migrations and managed services. Some believe that digital transformation is required to derive any cloud benefits and rule out the refactoring and restructuring, which would have worked better. Hence, the demand for consulting and transformation services is rising with the growing complexity of the IT landscape. Containerization has been picking up rapidly, with startups leading the cloud-native adoption. Kubernetes has been the unanimous platform of choice here. Both AWS and Azure have been adding more features around container technology. Service providers have been amassing cloud-native talent over the years and have started using containerization as a strategy for modernizing or re-architecting applications.

Fast changing MSP market: The public cloud MSP ecosystem has been growing and increasingly adding more service providers. Early entrants have an advantage here, but small and mid-sized providers are gaining traction with their unique offerings of public cloud managed services for multi-cloud environments. Several smaller providers are being acquired by large system integrators to either eliminate the competition and absorb them or to acquire that niche/unique capability or client segment. This consolidation and

shrinkage in the MSP market will prevail as technologies evolve. Public cloud providers have MSP certifications that every other system integrator is striving to acquire. In order to differentiate among MSPs, hyperscalers are conducting yearly audits and making the eligibility criteria even more stringent to get an MSP certification. Service providers are also differentiating themselves by creating their own IPs and bringing in vertical-specific expertise or having strategic partnerships with public cloud providers.

Different criterium to evaluate a cloud vendor: While discussing with the service provider community, ISG has concluded that companies based in the U.S. are more focused on their portfolio of features and how easy it is to integrate with the existing infrastructure ecosystem. Unlike European firms that are more concerned about data protection laws that mandate them to keep data within a boundary, U.S. companies are found to be mature enough to select a public cloud vendor based on the breadth of features available from various vendors as they have been using cloud services for a longer period. Before selecting a cloud managed services provider, enterprises are also seeking MSP certifications along with industry or technology competency certifications from hyperscalers.

Management and governance of clouds: CMPs have been an integral component of cloud managed services. Their primary role is to provide enterprises with a portfolio of cloud operation services along with the flexibility of working with the right cloud environment (private and public cloud). The CMP has a complete toolset for cloud-native development, application programming interface (API) management and integration, DevOps, integrated platform as a service (iPaaS) and container management. It should be a cloud-agnostic and vendor-neutral platform with a robust security layer overarching all the features and services provided. Service providers are either leveraging third-party platforms and tweaking the CMP to add features and white label it or are creating their

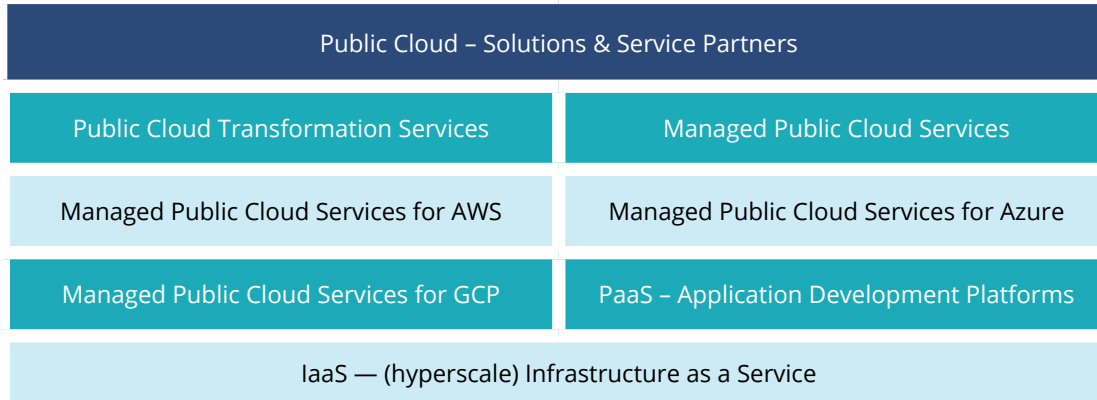
in-house product and selling it as a standalone product. They can differentiate themselves with the help of a robust CMP in front of a potential client. The downside of using a provider's CMP and not from a vendor is the risk of leading the enterprise client into a vendor lock-in.

Rise in PaaS adoption: Many organizations are taking the initiative to modernize existing applications and create new greenfield applications. The need for experienced and high-cost administrators for the platform becomes a challenge for some organizations that don't want to make the investment and would rather focus on their application development and features. PaaS has helped several enterprises to centralize application development and operations as well as adopt a managed container platform. The ease of using cloud-native technologies such as low-code/no-code offerings, serverless platforms and microservices on PaaS enables applications to have agility and undergo continuous innovation with a faster time to market. However, the PaaS market still needs a standardized approach and should mature to improve adoption.

Growing IaaS market: With the need to go digital in all aspects for an organization and for enhanced data security on public cloud, enterprises have started to migrate their critical workloads to public cloud platforms. The growth in public cloud adoption is also due to cloud-native application development and the increase in usage of containerization and microservices technologies for application development and deployment. This has led enterprises to achieve their cloud journey much easier and faster. In this segment, AWS has the first-mover advantage as it has been in the public cloud infrastructure domain for over a decade. On the other hand, Microsoft Azure's offerings are gaining more traction, especially with large enterprises that have legacy dependencies (Microsoft Office, Windows integration, etc.). Azure has thus become a far more popular choice with the increased adoption and is quickly catching up with AWS.

Introduction

Simplified illustration



Source: ISG 2019

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. This requires increased market adaptation and could lead to 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 that 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. The global combined market ACV rose 12 percent year over year, fueled

Definition (cont.)

by a robust IaaS market. The massive growth numbers in the as-a-service area indicate 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, Nordics, Brazil and Latin America

This 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.

Scope of the Report

The Public Cloud – Solutions & Service Partners 2019 U.S. report will assist buyers while reviewing a significant cloud transformation strategy and the capable service providers in numerous geographies. Enterprise clients will also benefit from the study because it incorporates ISG's strengths in global sourcing advisory, contract knowledge databases, regional research and expertise in technology ecosystems and innovations.

This study includes various reports from seven quadrants that cover cloud service models. Not all quadrants are covered within each geography. Coverage depends on provider responses, participation and relevance. Quadrants that are not covered in a region may be covered in future studies. The geographic report areas include Global, U.S., U.K., Germany, Switzerland, Nordics, Europe, Australia/New Zealand (ANZ), Brazil and Latin America (LATAM).

Definition (cont.)

The full set of quadrants covered in various geographic versions of this study are:

- **Public Cloud Transformation Services** assess the providers of advisory and migration services for public cloud infrastructure, primarily AWS, Google Cloud Platform (GCP) and Microsoft Azure.
- **Managed Public Cloud Services** cover companies that provide ongoing management and support services on top of public cloud infrastructure, primarily AWS, GCP and Microsoft Azure.
- **Managed Public Cloud Services for AWS** evaluates companies that provide ongoing management and support services on top of public cloud infrastructure for the Amazon Web Services platform.
- **Managed Public Cloud Services for Azure** assesses companies that provide ongoing management and support services on top of public cloud infrastructure for the Microsoft Azure platform.
- **Managed Public Cloud Services for GCP** looks into companies that provide ongoing management and support services on top of public cloud infrastructure for the Google Cloud Platform (GCP).
- **PaaS – Application Development Platforms** are focused on platform-as-a-service (aPaaS) providers that help create, operate and monitor applications. aPaaS market offerings cover application centric services, low-code/no-code development, as well as testing scenarios — all based on public clouds or variations of hosted private clouds.
- **IaaS — (hyperscale) Infrastructure as a Service** assesses those services providers that provide on-demand infrastructure, commonly referred to as a hosted private cloud (enterprise cloud). Enterprise cloud providers can supply multiple clouds that are customized at the customer's request, including the use of hybrid, multiple public and multiple private cloud providers.

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The “leaders” among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The “product challengers” offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor’s size or their weak footprint within the respective target segment.

Market Challenger

“Market challengers” are also very competitive, but there is still significant portfolio potential and they clearly lag behind the “leaders.” Often, the market challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and have therefore still some potential to optimize their portfolio and increase their attractiveness.

Contender

“Contenders” are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

Rising stars are mostly product challengers with high future potential. When receiving the "rising stars" award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the "rising stars" has an excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12-24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.

Public Cloud – Solutions & Service Partners - Quadrant Provider Listing 1 of 6

	Public Cloud Transformation Services	Managed Public Cloud Services	Managed Public Cloud Services for AWS	Managed Public Cloud Services for Azure	Managed Public Cloud Services for GCP	aPaaS - Application Development Platforms as a Service	IaaS - (Hyperscale) Infrastructure as a Service
2nd Watch	● PC	● PC	● PC	● PC	● Not In	● Not In	● Not In
Accenture	● L	● L	● L	● L	● L	● Not In	● Not In
Alibaba	● Not In	● Not In	● Not In	● Not In	● Not In	● C	● C
AllCloud	● C	● C	● C	● Not In	● Not In	● Not In	● Not In
Atos	● PC	● PC	● PC	● PC	● Not In	● Not In	● Not In
AWS	● Not In	● Not In	● Not In	● Not In	● Not In	● L	● L
Microsoft	● Not In	● Not In	● Not In	● Not In	● Not In	● L	● L
Birlasoft	● C	● C	● Not In	● Not In	● Not In	● Not In	● Not In
Capgemini	● L	● L	● L	● L	● Not In	● Not In	● Not In
Cascadeo	● Not In	● Not In	● C	● Not In	● Not In	● Not In	● Not In
CenturyLink	● C	● C	● PC	● C	● Not In	● Contender	● Not In

● L - Leader / ● PC - Product Challenger / ● C - Contender / ● MC - Market Challenger / ● RS - Rising Star

Public Cloud – Solutions & Service Partners - Quadrant Provider Listing 2 of 6

	Public Cloud Transformation Services	Managed Public Cloud Services	Managed Public Cloud Services for AWS	Managed Public Cloud Services for Azure	Managed Public Cloud Services for GCP	aPaaS - Application Development Platforms as a Service	IaaS - (Hyperscale) Infrastructure as a Service
CGI	● PC	● Not In	● Not In	● Not In	● Not In	● Not In	● Not In
Claranet	● Not In	● Not In	● Not In	● Not In	● Not In	● Not In	● Not In
Cloudreach	● Not In	● Not In	● PC	● PC	● Not In	● Not In	● Not In
Cognizant	● L	● L	● L	● PC	● Not In	● Not In	● Not In
Core Compete	● Not In	● Not In	● C	● Not In	● Not In	● Not In	● Not In
Crayon	● Not In	● Not In	● Not In	● C	● Not In	● Not In	● Not In
Deloitte	● MC	● Not In	● Not In	● Not In	● Not In	● Not In	● Not In
DLT Solutions	● Not In	● Not In	● MC	● Not In	● Not In	● Not In	● Not In
DoIT	● Not In	● Not In	● Not In	● Not In	● PC	● Not In	● Not In
DXC	● PC	● PC	● PC	● L	● Not In	● Not In	● Not In
ECS	● Not In	● Not In	● C	● Not In	● Not In	● Not In	● Not In

● L - Leader / ● PC - Product Challenger / ● C - Contender / ● MC - Market Challenger / ● RS - Rising Star

Public Cloud – Solutions & Service Partners - Quadrant Provider Listing 3 of 6

	Public Cloud Transformation Services	Managed Public Cloud Services	Managed Public Cloud Services for AWS	Managed Public Cloud Services for Azure	Managed Public Cloud Services for GCP	aPaaS - Application Development Platforms as a Service	IaaS - (Hyperscale) Infrastructure as a Service
Engine Yard	● Not In	● Not In	● Not In	● Not In	● Not In	● C	● Not In
Ensono	● Not In	● Not In	● PC	● C	● Not In	● Not In	● Not In
Everis	● Not In	● Not In	● C	● Not In	● Not In	● Not In	● Not In
Fujitsu	● PC	● PC	● Not In	● Not In	● Not In	● Not In	● Not In
Google	● Not In	● Not In	● Not In	● Not In	● Not In	● L	● L
Go Reply	● Not In	● Not In	● Not In	● Not In	● PC	● Not In	● Not In
HCL	● L	● L	● L	● L	● Not In	● Not In	● Not In
Heroku	● Not In	● Not In	● Not In	● Not In	● Not In	● PC	● Not In
HPE	● Not In	● Not In	● Not In	● MC	● Not In	● Not In	● Not In
IBM	● L	● MC	● Not In	● Not In	● Not In	● MC	● PC
Infinite	● C	● C	● Not In	● Not In	● Not In	● Not In	● Not In

● L - Leader / ● PC - Product Challenger / ● C - Contender / ● MC - Market Challenger / ● RS - Rising Star

Public Cloud – Solutions & Service Partners - Quadrant Provider Listing 4 of 6

	Public Cloud Transformation Services	Managed Public Cloud Services	Managed Public Cloud Services for AWS	Managed Public Cloud Services for Azure	Managed Public Cloud Services for GCP	aPaaS - Application Development Platforms as a Service	IaaS - (Hyperscale) Infrastructure as a Service
Infosys	● RS	● L	● L	● PC	● L	● Not In	● Not In
Logicworks	● Not In	● Not In	● Not In	● PC	● Not In	● Not In	● Not In
LTI	● PC	● PC	● Not In	● Not In	● Not In	● Not In	● Not In
Mendix	● Not In	● Not In	● Not In	● Not In	● Not In	● PC	● Not In
Microland	● C	● C	● Not In	● Not In	● Not In	● Not In	● Not In
Mindtree	● RS	● RS	● Not In	● Not In	● Not In	● Not In	● Not In
Mphasis	● PC	● PC	● Not In	● Not In	● Not In	● Not In	● Not In
Navisite	● Not In	● Not In	● Not In	● C	● Not In	● Not In	● Not In
NIIT	● C	● C	● Not In	● Not In	● Not In	● Not In	● Not In
NTT	● MC	● MC	● MC	● MC	● Not In	● Not In	● Not In
Oracle	● Not In	● Not In	● Not In	● Not In	● Not In	● PC	● PC

● L - Leader / ● PC - Product Challenger / ● C - Contender / ● MC - Market Challenger / ● RS - Rising Star

Public Cloud – Solutions & Service Partners - Quadrant Provider Listing 5 of 6

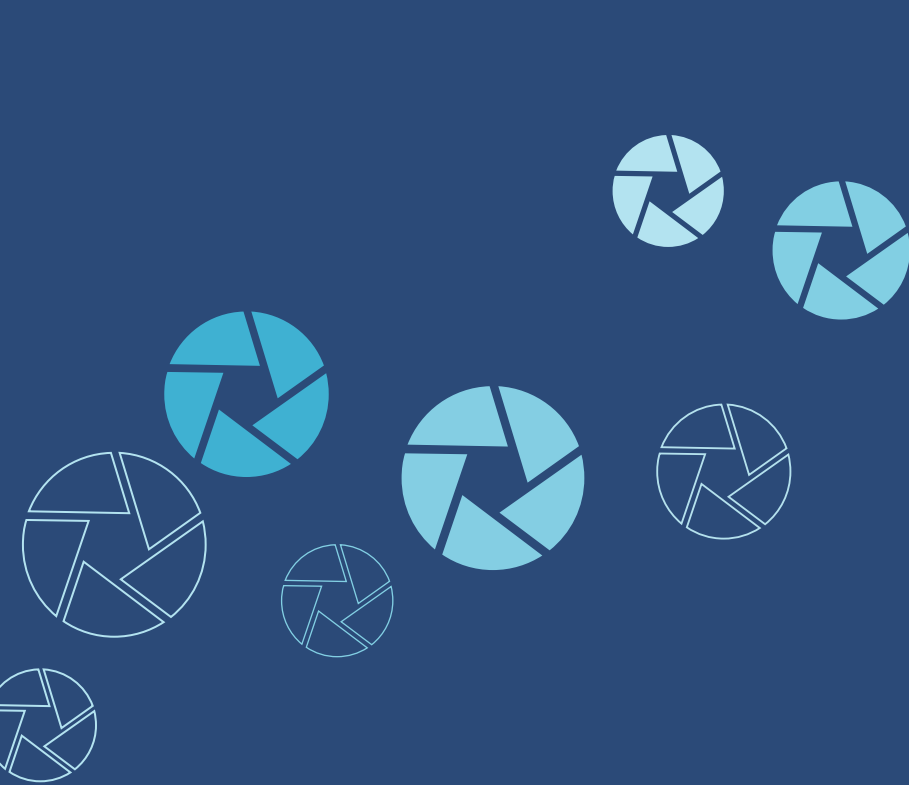
	Public Cloud Transformation Services	Managed Public Cloud Services	Managed Public Cloud Services for AWS	Managed Public Cloud Services for Azure	Managed Public Cloud Services for GCP	aPaaS - Application Development Platforms as a Service	IaaS - (Hyperscale) Infrastructure as a Service
OVH	● Not In	● Not In	● Not In	● Not In	● Not In	● Not In	● C
Oxya	● Not In	● Not In	● Not In	● Not In	● C	● Not In	● Not In
Pivotal	● Not In	● Not In	● Not In	● Not In	● Not In	● PC	● Not In
Rackspace	● RS	● L	● L	● L	● L	● Not In	● Not In
Red Hat	● Not In	● Not In	● Not In	● Not In	● Not In	● RS	● Not In
SADA	● Not In	● Not In	● Not In	● Not In	● PC	● Not In	● Not In
Smartronix	● Not In	● Not In	● Not In	● C	● C	● Not In	● Not In
Taos	● Not In	● Not In	● Not In	● Not In	● PC	● Not In	● Not In
TCS	● L	● L	● L	● L	● Not In	● Not In	● Not In
Tech Mahindra	● PC	● PC	● Not In	● Not In	● Not In	● Not In	● Not In
Trianz	● PC	● PC	● RS	● Not In	● Not In	● Not In	● Not In

● L - Leader / ● PC - Product Challenger / ● C - Contender / ● MC - Market Challenger / ● RS - Rising Star

Public Cloud – Solutions & Service Partners - Quadrant Provider Listing 6 of 6

	Public Cloud Transformation Services	Managed Public Cloud Services	Managed Public Cloud Services for AWS	Managed Public Cloud Services for Azure	Managed Public Cloud Services for GCP	aPaaS - Application Development Platforms as a Service	IaaS - (Hyperscale) Infrastructure as a Service
T-Systems	● Not In	● Not In	● Not In	● Not In	● Not In	● Not In	● Not In
Unisys	● C	● MC	● MC	● Not In	● Not In	● Not In	● Not In
Wipro	● L	● L	● L	● L	● Not In	● Not In	● Not In
Zensar	● C	● PC	● Not In	● Not In	● Not In	● Not In	● Not In
Zoho	● Not In	● Not In	● Not In	● Not In	● Not In	● PC	● Not In

● L - Leader / ● PC - Product Challenger / ● C - Contender / ● MC - Market Challenger / ● RS - Rising Star



Public Cloud – Solutions & Service Partners Quadrants

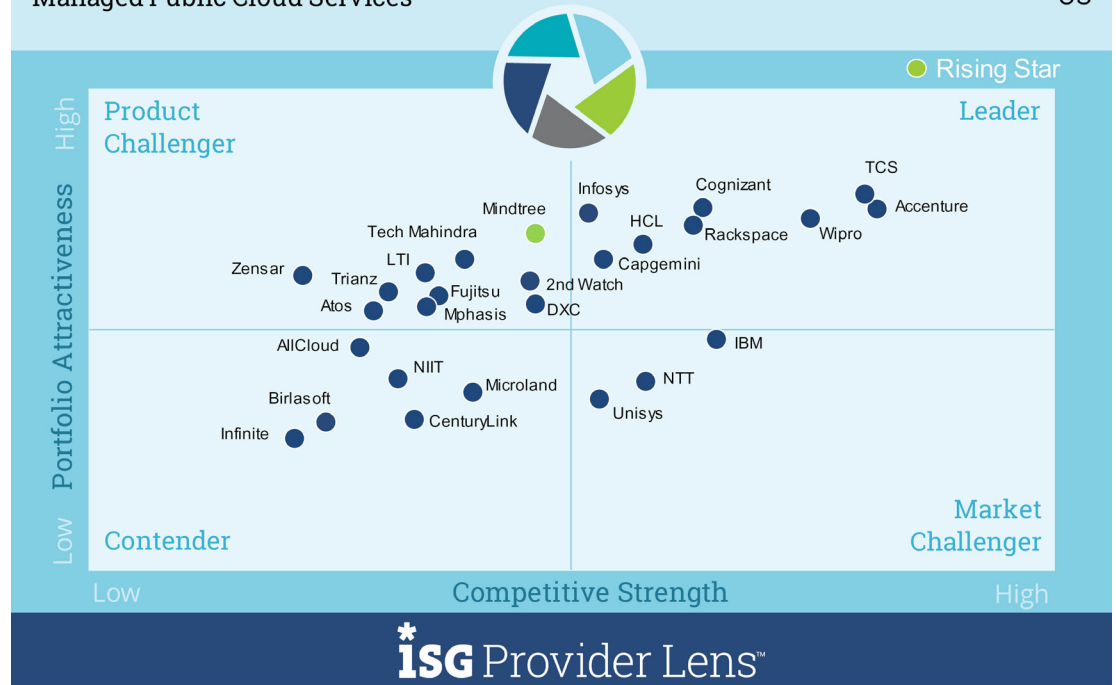
MANAGED PUBLIC CLOUD SERVICES

Definition

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 multi-cloud environments, 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.

Public Cloud – Solutions & Service Partners
Managed Public Cloud Services

2019
US



Source: ISG Research 2019

MANAGED PUBLIC CLOUD SERVICES

Definition (cont.)

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

MANAGED PUBLIC CLOUD SERVICES

Observations

Several U.S. clients seek transparency on data residency and cost management. Enterprises are looking on per-hour cost optimization to reduce overall cloud expenditure. Several enterprises have also been seen to shift workloads between cloud providers and adopt cloud bursting methods to save costs. Enterprises are moving to a multi-cloud and hybrid state to prevent vendor-lock in, but this has complicated the landscape and enterprise spend more on monitoring solutions than necessary. This often results in an increase in cross-cloud management costs and off-sets the price gains they foresee. This is where service providers help enterprises manage their multi-cloud environments. Enterprises expect system integrators to use features in the cloud management platform and optimize their services to provide maximum savings.

- **Accenture** has robust partnership ecosystem with maximum number of competencies under its belt has dominated the public cloud managed services market.
- **Capgemini** has been using its automation practice and account mining skills to drive its cloud revenue more than its competitors even though the number of clients in the U.S. are lower compared to its competitors.

- **Cognizant's** robust AWS partnership and advancements in IaaS provider specific automation capabilities along with a strong revenue growth and client base in the U.S. has helped it stand as a leader.
- **HCL's** DRYiCE™ platform and automation frameworks have helped it grow its U.S. revenue and client base significantly. It has strong expertise in manufacturing and retail verticals in the region.
- **Infosys** has strong vertical specific solutions for finance, telecom and retail industries. It has a robust partnership ecosystem with the top hyperscalers.
- **Mindtree's** automation centric approach to enhance its cloud management platform and migration process functionalities have been well appreciated by many clients
- **Rackspace** has been seeing significant growth due to its Fanatical Support services which is an industry leading practice. Its clients are mostly small and medium enterprises in the U.S.
- **TCS** has been steadily upskilling and reskilling its employees and its ignio™ platform is seeing a steady growth in adoption in the U.S.
- **Wipro** has a strong footprint in the U.S. as most of its clients are based here. Its BoundaryLess approach and Red Hat partnerships has helped the company in becoming a major contributor to its public cloud revenue in the region.

RISING STAR: MINDTREE

Overview

Mindtree is an IT outsourcing and managed services provider, headquartered in Michigan, the U.S. Mindtree has brought in revenues of more than USD 110 million from public cloud managed services in 2018. Mindtree has close to 2,000 engineers supporting cloud services for its clients in 12 different industries. Mindtree has strong focus in travel and transportation, BFSI, CPG and business services sector.

Strengths

Automation centric approach: Mindtree has several automation tools for workload assessment, migration, governance and manage process. For management of cloud infrastructure, Mindtree leverages its MWatch cloud management platform which integrates the functionality of ITSM, monitoring, APM and log analytics providing integrated cloud operations and governance. This platform provides a single pane of glass view of the health of all IT resources in hybrid, private, public or multi-cloud environments. It also enables clients to automate the DevOps process and build a CI/CD pipeline.

Maturing GCP partnership: Along with strong relationship with Microsoft Azure, Mindtree has now strengthened its partnership with Google Cloud Platform substantially by acquiring a “Premium Partner” status in addition to the previous System Integration Partner competency. Mindtree’s automation capabilities have enabled it to migrate Big Data related and analytics related workloads to Google cloud without much rearchitecting of the workloads.

COTS application delivery: Mindtree has partnered with Microsoft and Murex to develop cost effective solutions for risk management and prevention that large banks typically rely on. Mindtree also has significant Azure management practice, as majority of cloud management is done on Azure platform. Therefore, Mindtree has expertise in managing client’s workloads as well as COTS applications on Azure platform.

Caution

Mindtree’s cloud services are focused more around media, retail and travel industry. Healthcare, for example is a key vertical that has been exhibiting a significant demand for digital transformation services. Mindtree could focus on this vertical to drive its growth and create a wholesome portfolio.



2019 ISG Provider Lens™ Rising Star

Mindtree has been successfully gaining momentum in hybrid cloud management especially with its strong partnership with Microsoft Azure and its automation driven cloud operation tools.



Methodology

METHODOLOGY

The research study “ISG Provider Lens™ 2019 – Public Cloud – Solutions & Service” analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process. It positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of Public Cloud – Solutions & Service market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG’s internal databases & advisor knowledge & experience (wherever applicable)
5. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
 - Strategy & vision
 - Innovation
 - Brand awareness and presence in the market
 - Sales and partner landscape
 - Breadth and depth of portfolio of services offered
 - Technology advancements



Authors and Editors



Shashank Rajmane, Lead Author

Senior Analyst

Shashank Rajmane is the Lead Analyst for Public Cloud Transformation and Data Center Outsourcing studies and has a total experience of 8 years in the technology research industry. Shashank is responsible for authoring quadrant reports around public and private cloud services and data center outsourcing market.

He has authored articles around the best practices in the cloud services domain and infrastructure services. Along with this Shashank helps ISG's enterprise clients' with their cloud strategy, service provider selection, contracts negotiation, etc. He also works with advisors and clients' requests for ad-hoc research assignments in the cloud domain, across industries, predominantly in Automotive, BFSI, Retail CPG and Energy sectors.



Jan Erik Aase, Editor

Director

Jan Erik Aase is a director and principal analyst for ISG. He has more than 35 years of collective experience as an enterprise client, a services provider, an ISG advisor and analyst. Jan Erik has overall accountability for the ISG Provider Lens™ reports, including both the buyer-centric archetype reports and the worldwide quadrant reports focused on provider strengths and portfolio attractiveness. He sets the research agenda and ensures the quality and consistency of the Provider Lens™ team.

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