



Public Cloud – Solutions & Services

Consulting and Transformational Services for Large Accounts

U.K. 2020

Quadrant
Report



Customized report courtesy of:



A research report
comparing provider
strengths, challenges
and competitive
differentiators

November 2020

About this Report

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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 September 2020 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.

All revenue references are in U.S. dollars (\$US) unless noted.

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EXECUTIVE SUMMARY

Increasing adoption of cloud services is estimated to be the major driver of the growth of the market in the U.K. Enterprise clients are adopting cloud technology more quickly than smaller firms, with the higher adoption rate, respectively. Infrastructure as a service has generated particular interest among IT decision-makers, particularly in SMEs, and is estimated to be the leading segment in the country. Additionally, ever-growing government cloud spending is a major factor driving the growth of the market, as public sectors are seeking to catch up with the private sector cloud adoption. U.K. businesses are steadily adopting a cloud-first approach, and a growing number of companies can foresee a time when they will move all their IT to the cloud. While smaller businesses are able to make the logical step to remove their depreciated hardware assets and move entirely to the cloud, this is less feasible for larger organizations with heavy infrastructure investments. Therefore, “cloud everything” will not be attainable for all for some time and we predict that the vast majority of companies will continue to maintain hybrid IT environments. Nonetheless, ISG is certain that cloud’s momentum will continue as cloud users move more parts of their estate and take on more complicated migrations.

According to the Q2 2020 ISG Index™ report, the annual contract value (ACV) for deals of €5 million (£4 million) or more shows combined market ACV in Europe, the Middle East and Africa (including both as-a-service and managed services) was down 9 percent, to €3.9 billion (£3.6 billion), in the second quarter. This is the first time since 2018 that the

region has recorded back-to-back declining quarters. Managed services weighed down overall results, with a 21 percent drop in ACV, to €2.3 billion (£2.1 billion). Within managed services, information technology outsourcing (ITO) was down 19 percent, to €1.9 billion (£1.7 billion), while business process outsourcing (BPO) slumped 31 percent, to €346.4 million (£314.0 million).

In the U.K. and Ireland, the impact of the pandemic caused Q2 2020 managed services ACV to decline 5.6 percent versus the prior year, to €734 million (£663 million). For the first half of the year, managed services were down 10.8 percent, to just over €1.3 billion (£1.2 billion). Demand for cloud technology in this market is expected to continue growing to support remote working, while managed services remains under pressure from the pandemic.

Brexit and COVID-19 impact led to increase in niche talent demands: Due to Brexit, enterprise clients are not circulating large requests for proposals and requests for information (RFPs and RFIs) because the repercussions of Brexit are not yet clear. There is apprehension in the market that there could be a shortage of niche skills, especially in the areas of science, technology, engineering and mathematics (STEM). This skills gap and the continuous demand for innovation would lead to further traction in IT outsourcing deals. It is pertinent to watch for trade deals between the U.S. and the U.K. that would define future captive centers and the establishment of new offices across verticals in the region.

Companies in Europe are also facing the challenge of staff working from home because of the COVID-19 pandemic. They are also dealing with processes they wish they had automated before most of their employees had to work from home. These circumstances will be the deciding factor for many European companies opening up to digitizing and automating their work and business processes and lowering the threshold for outsourcing in the future. Therefore, in the long run, European companies may be more likely to outsource their IT or business processes to other countries.

U.K. government's digital strategy: The government's principal objective is to create a world-leading digital economy that works for everyone, strengthening the U.K. economy in the long term. The execution drives multiple elements in the digital transformation journey. This includes building a world-class digital ecosystem, enhancing the digital skills access for all U.K. enterprises, and making the U.K. the most suitable region for digital business. AWS, Azure and GCP are becoming an integral part of the digital transformation journey of the public sector and enterprise clients.

Surge in public cloud services consumption: U.K. enterprises are realizing the power of cloud services and solutions to address consumer needs. A larger percentage of enterprises is focused on executing a multi-cloud strategy toward building cloud-native solutions. Small and medium-sized businesses (SMBs) are also increasingly adopting cloud-native solutions and transformation strategies. AWS, Azure and Google cloud platform are the key players that drive the digital transformation journey of enterprises. These hyperscalers offer a wide range of services and platform enablement to enterprises, so CTOs are considering them for R&D engagements to drive the different product services in the U.K. and global markets.

Cloud optimization resulting in to increase in migration: Cloud-to-cloud migrations is rising as more companies give attention to optimizing their cloud footprint. Companies seek a service provider who can deliver the most value for their IT spent and want the ability to move their data and avoid vendor lock-in. Maintaining a multi-cloud environment allows companies to better manage business risks.

Demand for cognitive and intuitive cloud managed services: The public cloud managed services partner (MSP) ecosystem has been growing and increasingly adding more service providers. Early entrants have an advantage here, but small and midsize 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 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. 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 IP and bringing in vertical-specific expertise or having strategic partnerships with public cloud providers.

Multi-cloud has become the new normal: Enterprises do not wish to stick to just one hyperscaler, because each one has certain exclusive strengths in term of vertical solutions, prices and other factors. When enterprises embark on their cloud journeys, they want to try out their vision with each hyperscaler in order to pick the right partner for success and

not just a commodity service provider. Most enterprises have been using a multi-cloud environment. This trend is expected to surge irrespective of the enterprise size. However, there are some barriers to a multi-cloud setup. Orchestration involves several moving parts in a complex setup to be operated in a public cloud environment. Many users find it difficult to manage multi-cloud environments, and they are increasingly adopting various tools to try handle this complexity, but these are not mature enough. Other barriers included vendor lock-in by the public cloud provider and interoperability between two or more public cloud providers.

Soaring IaaS marketplace: Some enterprises and SMBs in the U.K. are able to eliminate their depreciated hardware assets and move completely to the cloud. This is less feasible for larger organizations with heavy infrastructure investments. Many were expected to continue maintaining hybrid IT/multi-cloud environments. However, with the need for organizations to go digital in all aspects and for enhanced data security on the 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 increasing use of containerization and microservices technologies for application development and deployment. This has led enterprises to

achieve their cloud journey much more easily and faster. In this segment, AWS has the first-mover advantage because 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.

Advancement in PaaS implementation: U.K. enterprise clients and midsize customers are taking the initiative to modernize existing applications as well as create a cloud-native approach. The need for experienced and high-cost administrators for the platform becomes a challenge for some organizations that do not want to make the investment and would rather focus on their application development and features. Platform as a service (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 can lead to more agile applications that undergo continuous innovation with a faster time-to-market. However, the PaaS market still needs a standardized approach and must mature to improve adoption.

Introduction

Simplified illustration

Public Cloud – Solutions and Services 2020	
Consulting and Transformation Services for Large Accounts	Consulting and Transformation Services for Midmarket
Governance, Risk and Compliance Services	Managed Public Cloud Services for large Accounts
Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services
Hyperscale Infrastructure and Platform Services	

Source: ISG 2020

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 as well as 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 Q1 2020 ISG Index™, the global market has grown 7 percent in combined market annual contract value (ACV) since Q4 2019 to reach its current value of \$14.8 billion. In the same period, as-a-service ACV has increased by 11 percent to reach \$7.9 billion. The IaaS market grew 18 percent to \$5.9 billion and the software-as-a-service (SaaS) market dropped by 4 percent to \$2 billion. The growth 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.

Definition (cont.)

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 and 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.

Scope of the Report

The Public Cloud – Solutions & Service Partners 2020 U.K. 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 in 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 U.S., U.K., Germany, Switzerland, the Nordics, France and Brazil.

Definition (cont.)

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

Consulting and transformation services for large accounts: This quadrant assesses a service company's ability to provide cloud assessment, advisory, workload migration and cloud consulting for large businesses. The enterprises are subject to strict regulations that can complicate engagements. They typically have more than 5,000 employees and revenues of more than \$1 billion.

Consulting and transformation services for midmarket: In this quadrant, we assess a service company's ability to provide cloud assessment, advisory, workload migration and continuous service transformation for public cloud service for medium-sized businesses. The enterprise client typically has fewer than 5,000 employees or generates less than \$1 billion in revenue.

Managed public cloud services for large accounts: This quadrant assesses a service company's ability to provide multi-cloud managed services for large businesses. The enterprises are subject to strict regulations that can contribute to complex engagements. They typically have more than 5,000 employees and revenues of more than \$1 billion.

Managed public cloud services for midmarket: In this quadrant, ISG assesses a service company's ability to provide multi-cloud managed services for public cloud

service for medium-sized businesses. The enterprise client typically has fewer than 5,000 employees or generates less than \$1 billion in revenue.

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.

Hyperscale infrastructure and platform services Suppliers in this quadrant 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.

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

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 therefore have 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 usually Product Challengers with high future potential. Companies that receive the Rising Star award have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Rising Stars also have 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 to 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. In dependence of the market ISG positions providers according to their business sweet spot, which can be the related midmarket or large accounts quadrant.

Public Cloud - Solutions & Services - Quadrant Provider Listing 1 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Governance, Risk and Compliance Services	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services
3stepIT	● Not in	● Contender	● Not in	● Not in	● Not in	● Not in	● Not in
Accenture	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in	● Not in
Acora	● Not in	● Not in	● Not in	● Not in	● Contender	● Not in	● Not in
Alibaba	● Not in	● Not in	● Not in	● Not in	● Not in	● Contender	● Contender
Atos	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in	● Not in
AWS	● Not in	● Not in	● Not in	● Not in	● Not in	● Leader	● Leader
Birlasoft	● Not in	● Not in	● Not in	● Contender	● Not in	● Not in	● Not in
CANCOM	● Not in	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in
Capgemini	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in	● Not in
Claranet	● Product Challenger	● Leader	● Market Challenger	● Rising Star	● Leader	● Not in	● Not in
Cloudreach	● Product Challenger	● Leader	● Not in	● Market Challenger	● Leader	● Not in	● Not in
Coforge	● Market Challenger	● Rising Star	● Contender	● Market Challenger	● Market Challenger	● Not in	● Not in
Cognizant	● Leader	● Not in	● Product Challenger	● Product Challenger	● Not in	● Not in	● Not in
Computacenter	● Market Challenger	● Leader	● Not in	● Rising Star	● Leader	● Not in	● Not in

Public Cloud - Solutions & Services - Quadrant Provider Listing 2 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Governance, Risk and Compliance Services	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services
Deloitte	● Not in	● Not in	● Leader	● Not in	● Not in	● Not in	● Not in
DXC	● Rising Star	● Not in	● Not in	● Leader	● Not in	● Not in	● Not in
Ensono	● Product Challenger	● Leader	● Not in	● Market Challenger	● Rising Star	● Not in	● Not in
EY	● Not in	● Not in	● Leader	● Not in	● Not in	● Not in	● Not in
Fujitsu	● Leader	● Not in	● Not in	● Leader	● Not in	● Not in	● Not in
Google	● Not in	● Not in	● Not in	● Not in	● Not in	● Market Challenger	● Leader
HCL	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in	● Not in
Hexaware	● Product Challenger	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in
IBM	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Product Challenger	● Product Challenger
Infosys	● Leader	● Not in	● Not in	● Leader	● Not in	● Not in	● Not in
KPMG	● Not in	● Not in	● Leader	● Not in	● Not in	● Not in	● Not in
Lemongrass Consulting	● Market Challenger	● Leader	● Not in	● Not in	● Leader	● Not in	● Not in
Logicalis	● Not in	● Product Challenger	● Not in	● Not in	● Market Challenger	● Not in	● Not in
Logicata	● Not in	● Market Challenger	● Not in	● Not in	● Product Challenger	● Not in	● Not in

Public Cloud - Solutions & Services - Quadrant Provider Listing 3 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Governance, Risk and Compliance Services	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services
LTI	● Product Challenger	● Product Challenger	● Not in	● Product Challenger	● Product Challenger	● Not in	● Not in
Microland	● Contender	● Product Challenger	● Not in	● Contender	● Product Challenger	● Not in	● Not in
Microsoft	● Not in	● Not in	● Not in	● Not in	● Not in	● Leader	● Leader
Mindtree	● Product Challenger	● Rising Star	● Not in	● Product Challenger	● Rising Star	● Not in	● Not in
Mphasis	● Contender	● Product Challenger	● Not in	● Contender	● Not in	● Not in	● Not in
Node4	● Not in	● Not in	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Nordcloud	● Not in	● Product Challenger	● Not in	● Not in	● Product Challenger	● Not in	● Not in
oneadvanced	● Not in	● Not in	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Oracle	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in	● Product Challenger
OVHcloud	● Not in	● Not in	● Not in	● Not in	● Not in	● Contender	● Contender
Protera	● Not in	● Market Challenger	● Not in	● Not in	● Contender	● Not in	● Not in
PwC	● Not in	● Not in	● Leader	● Not in	● Not in	● Not in	● Not in
Pythian	● Not in	● Contender	● Not in	● Not in	● Market Challenger	● Not in	● Not in
Rackspace Technology	● Product Challenger	● Leader	● Not in	● Leader	● Leader	● Not in	● Not in

Public Cloud - Solutions & Services - Quadrant Provider Listing 4 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Governance, Risk and Compliance Services	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services
SAP	● Not in	● Not in	● Not in	● Not in	● Not in	● Product Challenger	● Not in
Slalom	● Not in	● Product Challenger	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Sopra Steria	● Product Challenger	● Product Challenger	● Not in	● Not in	● Not in	● Not in	● Not in
TCS	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in	● Not in
Tech Mahindra	● Product Challenger	● Not in	● Not in	● Product Challenger	● Product Challenger	● Not in	● Not in
Trasnpotec	● Not in	● Not in	● Not in	● Not in	● Contender	● Not in	● Not in
Unisys	● Product Challenger	● Product Challenger	● Not in	● Product Challenger	● Leader	● Not in	● Not in
Virtusa	● Not in	● Not in	● Not in	● Not in	● Contender	● Not in	● Not in
Virtustream	● Not in	● Not in	● Not in	● Not in	● Not in	● Product Challenger	● Not in
Wipro	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in	● Not in



Public Cloud - Solutions & Services Quadrants

ENTERPRISE CONTEXT

Consulting and Transformation Services for Large Accounts

This quadrant is relevant to large enterprises in the U.K. that are evaluating consulting and transformation service providers. In this quadrant report, ISG lays out the current market positioning of these providers in the UK and how they can address key challenges in large enterprises' migration journeys to the public cloud environment.

Enterprises have been reluctant to migrate to the public cloud owing to difficulties such as assessing the workloads, change management, a shortage of talented specialists or skill gaps, and uncertainties about integration of existing infrastructure. In 2020, however, the urge to move workloads to public cloud has become more pressing than ever and many enterprises are accelerating their digital transformation. This report can help with choosing the right provider to overcome the challenges and address the difficulties mentioned.

For enterprises, the benefits of working with consulting and transformation service providers include experienced workload assessment, transformation roadmaps, advisory on workload migration, re-architecture of legacy applications and integration of automation capabilities.

Enterprises in the U.K. have the unenviable task of trying to determine their best course of technical investment amid significant turmoil brought about by the Brexit process. Consulting and transformation service providers can help them by creating a framework for workload migration based on a thorough understanding of the operating environment in the U.K. and data protection regulations.

ISG sees that enterprises are increasingly shifting their focus from lift and shift to long-term application modernization, hence re-architecture, middleware modernization and cloud-native environments are on the rise in the U.K. Enterprises in the UK are willing to invest in migration, although cost optimization is a major focus area in their cloud journey.

IT leaders should read this report to better understand the relative strengths and weaknesses of consulting and transformation service providers, as well as to help them lead the digital transformation drive in their enterprises.

Software development and technology leaders should read this report to understand the positioning of consulting and transformation service providers, learn how those providers' offerings can impact an enterprise's ongoing transformation initiatives, and discover the benefits they can achieve by moving to the cloud.

Sourcing, procurement, and vendor management professionals should read this report to develop a better sense of the current landscape of consulting and transformation service providers in the U.K.

CONSULTING AND TRANSFORMATIONAL SERVICES FOR LARGE ACCOUNTS

Definition

The public cloud enables enterprises to achieve agility and scalability without having to invest in 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; 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 a public cloud.

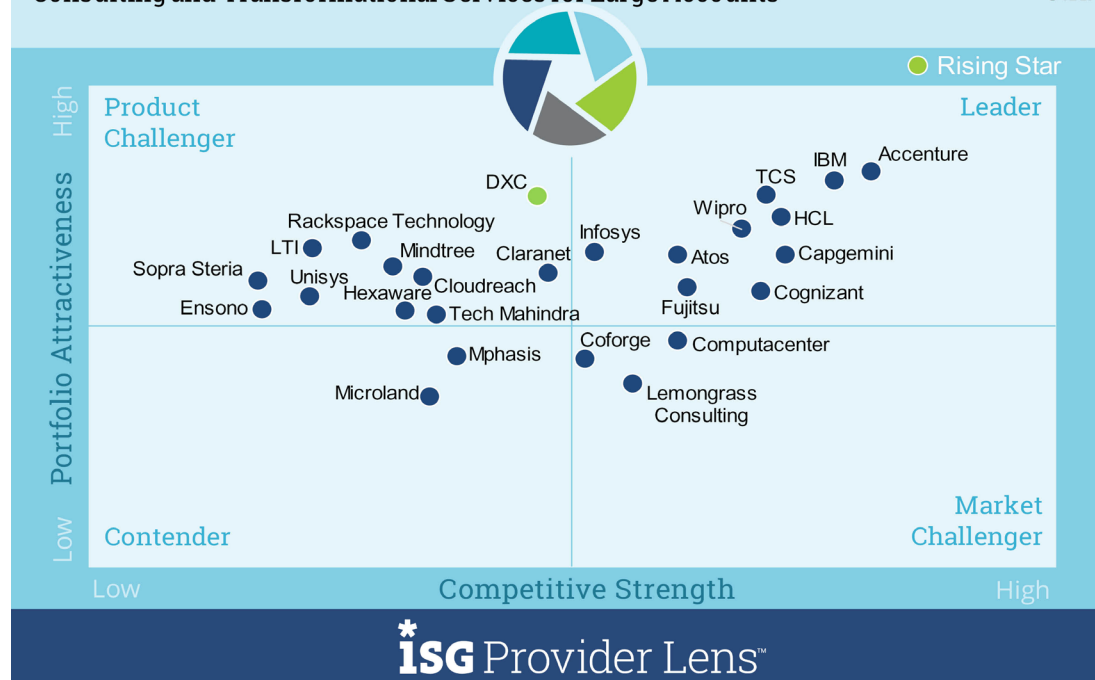
Transformation services: Designing and building the cloud architecture/environments, migrating and integrating applications, and optimizing the architecture to harness the cloud-computing features and benefits.

Public Cloud – Solutions and Services

Consulting and Transformational Services for Large Accounts

2020

U.K.



Source: ISG Research 2020

CONSULTING AND TRANSFORMATIONAL SERVICES FOR LARGE ACCOUNTS

Definition (cont.)

For this quadrant, we exclude the creation of private clouds because they are covered in a separate study on Next-Gen Private/Hybrid Cloud Data Center Service and Solution Providers. Accordingly, the Public Cloud Consulting and Transformation Services 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, including templates, automation engines and ISV partnerships.
- Hyperscale provider-related partner program certifications from a solutions standpoint.
- Competencies that are specific to a vertical (industry) or horizontal (technology).
- Client references and projects or use cases.
- Hybrid cloud integration and support services.

CONSULTING AND TRANSFORMATIONAL SERVICES FOR LARGE ACCOUNTS

Observations

Cloud consulting and transformation have taken center stage in 2020 as the business world has struggled to adjust to the new normal of remote operations amid the global pandemic. Over the last two quarters, the U.K. market has seen a surge in cloud consulting and transformation services due to need for more online supply chain solution, collaboration services, etc. To drive such complex transformation services, enterprise clients seek a provider with robust cloud portfolio and proven capabilities in the region. To address the need to clients' cloud transformation journey, global system integrators have invested in building a mature cloud management platform, factory-based migration model and various accelerators. Enterprise clients also seek providers with an ability to work with them in building cloud industrial solutions, big data platform and analytics solutions.

Of the 49 companies included in this study, 26 have qualified for this quadrant. Ten are Leaders and one is a Rising Star.

- **Accenture's** Avanade partnership with Microsoft has helped the firm win a significant number of Azure-based transformation deals. Its robust cloud consulting and advisory frameworks have also helped in winning large transformation engagements in the U.K. market.
- **Atos'** decision factory and cloud migration factory are good examples of a well-structured and mature service portfolio that supports a broad spectrum of cloud-related aspects like cybersecurity, big data, collaboration and artificial intelligence (AI).
- **Capgemini** has increased traction in the energy and healthcare verticals in the U.K. owing to its strong focus on industry-specific solutions.
- **Cognizant** is expanding its presence in the U.K. and has executed several transformation engagements. Its set of tools and frameworks, especially CloudSteps, have been instrumental in executing transformational projects.
- **Fujitsu** has decades of experience in serving the U.K. market and has several clients in the public sector. The firm has planned to hire more staff to train and serve U.K. enterprises.
- **HCL** has been witnessing strong revenue growth due to its continuous innovation and investments in cloud and digital transformational products.

CONSULTING AND TRANSFORMATIONAL SERVICES FOR LARGE ACCOUNTS

Observations (cont.)

- **IBM** has wide range of cloud services portfolio along with strategic commitment with U.K. public sector clients.
- **Infosys** has developed DevOps-centric solutions and has been hiring and training its workforce specifically on DevOps and public cloud-specific certifications.
- **TCS** offers a consultative approach and best-in-class digital skills to power its Business 4.0™ transformations. This has helped facilitate the transformation journey of several U.K. enterprises.
- **Wipro** has a gamut of services centered around its enterprise digital operation services. Its center of excellence for innovation has helped the firm win many large enterprise deals in the U.K. market.
- **Rising Star DXC** has been growing in the public cloud space by making alliances and strategic partnerships with public cloud platforms and vendors to offer strong migration services.



ACCENTURE

Overview

Accenture's overall revenues are mainly driven by its consulting and transformation engagements. Accenture has 21 offices in the U.K., where it employs more than 11,000 employees across service lines. The company has won multiple large cloud transformation deals. It was named a Leader in ISG's 2019 Public Cloud transformation study for the U.K. market. In 2020, the acquisition of U.K.-based strategic data consultancy firm Mudano further strengthened its analytics, data and AI transformation capabilities.

Strengths

Consulting-led transformation engagements: Accenture works with Tier 1 public cloud services providers to ensure that its large enterprise client base can take advantage of the next generation of public cloud transformation and services. It has the highest levels of partnerships with the top three cloud hyperscalers and has dedicated business groups for AWS, Google, and Microsoft. Its wide framework, intellectual property and partner tools ecosystem have helped solidify its position in the U.K. market.

Value- and consumption-based pricing: The firm's value-based pricing is a preferred approach, with a percentage of fees tied to the customer achieving the intended business outcome. The organization has experience with large-scale engagements using value-based deals. Pricing typically involves approaches such as risk-adjusted returns involving client partnerships where success is measured jointly, not as a vendor deliverable, and fees at risk are based on realized value spread across the engagement's lifecycle. Accenture's cloud services, such as managed services and cost optimization, are priced based on the percentage of spend in the consumption-based pricing model.

Accenture myWizard®: Accenture's myWizard® microservices-based architecture enables the organization to expand on existing clients and other tools by incorporating innovation from across the technology ecosystem. Also, myWizard® mines multiple sources of data such as tickets, application, web logs, code quality, application data, testing coverage, defects and social media data into a common data fabric to make complex correlations, generate insights and enable deep-learning capabilities.

Caution

Continuous investments in the Accenture cloud platform have brought in a strong capability that is easily accepted by clients. Accenture recently released a next-generation version of ACP that moves it away from a proprietary platform, thereby avoiding vendor lock-in and enabling best-of-breed tooling.



2020 ISG Provider Lens™ Leader

Accenture's strong consulting-led transformation engagements and proven execution model ensure its strong positioning in the region.

ATOS



Overview

Atos provides solutions and services for the private and public sector clients in the U.K. and internationally. Atos employs more than 10,000 employees in the U.K. and Ireland market, with a consolidated revenue of more than \$1.9 billion. It offers business solutions such as cloud consulting, complex IT landscape migration and microservices service-oriented architectures. The company also provides IT outsourcing services, including cloud-native application management as well as multi-cloud and hybrid cloud IT services. It serves airports and aviation, automotive, banking, discrete manufacturing, energy, healthcare, insurance, media and entertainment, and the public sector.



Strengths

IP-led transformation: Atos' decision factory and cloud migration factory are examples of a well-structured and mature service portfolio that supports a broad spectrum of cloud-related aspects like cybersecurity, big data, collaboration and artificial intelligence.

Platform ecosystem: The company has proven experience in using DevOps tools such as Jenkins, AWS OpsWorks and Ansible. It holds strong partnerships with Microsoft Azure and AWS and recently began supporting GCP through a strategic alliance.

Cloud and DevOps expertise: Atos has a range of cutting-edge transformation skills and supports both legacy and cloud-native demands. Atos Managed OpenShift (AMOS) helps enterprises modernize their application landscape and develop cloud-native applications. AMOS unites developers and IT operations by providing a managed container platform with a single-pane-of-glass view to manage all applications.



Caution

Atos has worked more on hybrid IT transformation engagements. The firm should craft the right marketing strategy to highlight public cloud transformation capabilities.



2020 ISG Provider Lens™ Leader

Atos' strategic partnership with Google has helped the firm bolster its public cloud business. The firm has a strong presence in Europe and has several government clients. It offers a wide array of services and recently renewed its partnerships with cloud service providers, along with the highest score in its managed service partner (MSP) audit.

CAPGEMINI

Overview

Capgemini U.K. provides consulting and transformation services to private and public enterprise clients. Capgemini's cloud transformation and consulting services revenues in the U.K. were over \$100 million in 2019 with nearly 90 clients. The company employs more than 1,000 cloud-certified employees in the U.K. It offers cloud native and non-native application migration and management, cloud consulting, mobile solutions, procurement, service integration and professional services.

Strengths

Local niche talent availability: Capgemini has a substantial number of employees working across verticals in private and public sector clients. The organization has invested significantly in re-skilling and up-skilling its cloud consulting and transformation team. It has a strong presence in the U.K. market locally as well as robust nearshore and offshore skills availability to offer optimized balanced services.

Cognitive cloud management platform: Capgemini's multi-cloud management operational model has the ability to manage and control each of the major hyperscale providers through a common cloud-agnostic tool set. This enables clients to make full use of the public cloud vendors and without any operational burden while migrating workloads between various public cloud providers.

Clinical IT landscape assessment tool: The organization has a proven economic Application Portfolio Management framework, which leverages AI and analytics to evaluate clients' IT landscape and delivers visual insights and a roadmap to empower clients to rationalize their application portfolio. The organization has assessed large set of applications across industries with pre-committed savings to customers.

Caution

Capgemini is known for its large-scale transformation engagements. The firm should also focus on catering to enterprises that seek small-scale portfolio transformation engagements.



2020 ISG Provider Lens™ Leader

Capgemini's cloud go-to-market and solutioning are driven by a regional center of excellence that brings together cloud and industry-specific knowledge and experience.

COGNIZANT

Overview

Cognizant provides consulting and transformation services in U.K. The firm has more than 500 employees in the region for public cloud platforms. Cognizant was named a leader in ISG's Public Cloud Transformation Services report in 2019. In 2020, Cognizant has entered into an agreement to acquire New Signature, which has presence across the U.S., the U.K. and Canada, to strengthen the public cloud transformation capabilities.

Strengths

Cloud360 iCMP-integrated platform: Cognizant Cloud360 iCMP is an integrated cloud management platform that includes AI-based automated service delivery to ease the complexity of managing multi-cloud environments. The platform leverages the company's intellectual property tools and third-party tools including blueprints, automation assets and reference architectures to maximize automation of cloud operations. Its cloud management platform manages complex infrastructure including multi-cloud/hybrid-cloud environments by providing centralized governance and decentralized provision of services.

Transformation framework: Cognizant's CloudSteps™ offers end-to-end transformation framework, which simplifies the cloud journey with a comprehensive set of intellectual property methodologies, processes, tools and accelerators to achieve seamless cloud transformation. The proven framework has shown the best value creation in assessing the workload placement strategy for enterprise clients. The framework helps clients achieve optimal business outcomes, including financial visibility through understanding the current IT infrastructure, and build migration factory for rapid deployments. Also, the firm's AppLens™ tool is a one-stop assessment platform to evaluate application health and determine the cloud-readiness of application workloads.

Consulting and implementation services: Cognizant is continuing to strengthen its transformational services with more than 50 innovative blueprints, intellectual properties, and accelerators, which includes migration and consulting. The firm is focused on simplification, automation and cloud-native digital business solutions for its enterprise clients.

Caution

Cognizant has strengthened its portfolio capabilities in recent years, however the organization has headroom to increase its cloud business market stake in the U.K. market from private and public cloud clients' perspectives.



2020 ISG Provider Lens™ Leader

Cognizant strives to automate as much as possible to increase efficiency and reduce costs for the customers in U.K. market. It has a robust multi-cloud management platform with various tools catering to the environment and requirements specific to the client.

FUJITSU



Overview

Fujitsu is a managed services provider headquartered in Tokyo. The firm serves a large number of public cloud transformation clients in the U.K. and derives 55 percent of its total revenue from public cloud consulting and transformation engagements. Fujitsu has more than 730 employees in the U.K. working on public cloud technologies. It has opened a global R&D center of excellence for AI, blockchain and quantum computing in addition to IoT, security, multi-cloud and analytics in the U.K.



Strengths

Skills availability in FY 2019/2020: Fujitsu has made a deeper commitment to the U.K. public sector and enterprises clients by adding more than 1,000 certified and trained cloud architects and consultants.

Co-creation migration approach: Fujitsu's cloud service for public cloud transformation offers a strong foundation with the co-creation model to accelerate the transformation journey. The firm offers a range of transformation capabilities and intellectual property that are proven by Agile consulting methodologies and many successful customer cases in the U.K. market.

Key supplier with robust technical platform skills for U.K. public sector: With more than two decades of catering to U.K. government clients, Fujitsu has become a key supplier in the public sector. Fujitsu has business and technical experts with end-to-end knowledge and skills for Microsoft, Oracle and the AWS Cloud. The firm has more than 700 Azure-certified, 500 AWS-certified and 300 Cloud Foundry-certified employees to help curtail the need for cooperating with third-party suppliers for assessment or analysis.



Caution

European and U.K. enterprises prefer service providers that have a local research and development center to provide region-specific services. Fujitsu should thus focus on building a next-generation, cloud-led and vertical-specific R&D center in the region.



2020 ISG Provider Lens™ Leader

Fujitsu has a robust transformation wing to assist clients in their cloud transformation journey. Its hybrid IT seamlessly blends migration to the public and managed cloud with existing on-premises IT, thereby improving the business ecosystem of enterprises.

HCL



Overview

HCL provides public cloud consulting and transformation services in the U.K. market. HCL has large employees base in the region across public cloud platforms, and it has annual revenue of over \$200 million. The organization serves multiple clients across verticals. Also, it has pool of niche talent available in the U.K. market with deep domain experience.



Strengths

Cloud-centric ecosystem: HCL's cloud-native services have helped strengthened key relationships through strategic, joint go-to-market plans with Azure, Google, AWS, IBM and VMware| Cloud Foundry to offer enhanced vertical- and solution-specific competencies.

Continuous investments in transformational products: HCL is continuing to invest in building industry-leading, differentiated tools for optimized cloud enablement. These include ElasticOps for automated hybrid cloud operations, a cloud assessment tool, a cloud command center, and the HCL MyCloud portal for multi-cloud orchestration, self-service and dynamic provisioning solutions.

Accomplished CNCF® gold member accreditation: HCL has become Gold member of the Cloud Native Computing Foundation (CNCF®). The organization is committed to contributing to the CNCF® community and working toward a more comprehensive integration of open source technologies across its full spectrum of cloud-native services. This accreditation has elevated its open source and cloud-native technologies with its existing cloud service offering.



Caution

HCL should apply services that leverage the serverless architectures of public cloud providers. Function as a service (FaaS) is a new segment that has been seeing significant adoption. Its peers have already created use cases with either AWS or Azure for FaaS.



2020 ISG Provider Lens™ Leader

HCL's DRYICE framework and cloud-native capabilities have helped its clients automate their complex traditional IT across verticals in U.K. market.

IBM



Overview

IBM provides cloud and cognitive software along with decades of vertical experience. Its global technology services, global business group segment offers project, managed, outsourcing, and cloud-delivered services for enterprise IT infrastructure environments. The organization has 18 offices across the U.K. serving private and public sector enterprise clients with a pool of niche talent, pre-sales and cloud expert's availability. IBM infrastructure, led by the Red Hat Enterprise Linux platform, continued double-digit growth, and its cloud revenue was \$21.2 billion in 2019.



Strengths

Client innovation center: The firm's U.K. client innovation center is an entrepreneurial startup ecosystem that delivers the latest technical services to its clients. The innovation center enables its local clients to meet the technical, language, time zone and regulatory requirements of their projects.

IBM signs MoU with U.K. government: The organization has signed a memorandum of understanding (MoU) with the U.K. government to boost public cloud adoption in public sector. Under this agreement, the government would purchase cloud services at a discounted price for the next three years. This agreement with IBM offers great value to public sector organizations as they continue to innovate and improve essential services for citizens.

Wide-ranging cloud portfolio: IBM's breadth and depth of portfolio solutions cater to multi-cloud requirements with end-to-end management of public cloud services. The organization offers a tiered service model and uniquely integrated brokerage platform, which enables clients to select services that are designed especially for the cloud with native tooling for zero-touch operations, cognitive delivery through analytics and automation, and digital experience.



Caution

IBM has a large stack of certifications. However, IBM has changed its strategy to work with AWS and Microsoft Azure from managed services and migration front. It should focus on hyperscaler certification and competency accreditation.



2020 ISG Provider Lens™ Leader

IBM has strong thought leadership in the cloud and cognitive services segment. Its range of cloud services that bring the finest solutions to customer's needs to drive their digital transformation journey.

INFOSYS



Overview

Infosys offers cloud consulting, transformation and migration services in the U.K. The firm has more than 50 clients in the region for public cloud transformation services, and it has annual revenue of over \$300 million in the U.K. More than 90 percent of its clients in the U.K. are large enterprises with billion-dollar revenues. In the recent past, the firm announced the launch of Infosys Cobalt, a suite of services, platforms and solutions for the cloud that are designed to help enterprise business with cloud-powered transformation.



Strengths

Migration planning suite: Infosys knowledge-based workload migration solution suite automates remediation and enhances the reliability of applications in the cloud. The organization's cloud migration services team analyzes the interdependence of integration points to ensure business continuity.

Elevated services: Infosys has crafted a well-designed public cloud transformation model with an extensive service catalog, automation and self-service capabilities. Its continuous investments include cloud service assurance, leading the path for continuous innovation for enterprise clients.

Ready to deploy asset: Infosys has prebuilt industry blueprints, which can be deployed with one click. It also has various horizontal solutions as a part of its cloud service offering. The overall portfolio enables its clients with Agile transformation journey with value added realization.



Caution

Infosys has executed multiple transformation engagements in the U.K. However, it is important for the firm to establish a co-innovation center in the region along with acquiring more certifications locally for its U.K. business.



2020 ISG Provider Lens™ Leader

Infosys offers a range of end-to-end transformation tools and cutting-edge services along with a comprehensive product portfolio.

TCS



Overview

TCS provides strategic cloud consulting, advisory and complex migration services in the U.K. market. The organization has deep domain expertise across industries along with highest cloud service providers' accreditations. The organization is known for customer-centricity, contextual knowledge, and investments in research and innovation, up-skilling and intellectual property. During the COVID-19 pandemic, TCS has also introduced a transformative operating model that offer secure, borderless workspaces™ and helps its U.K.-based clients to transition to virtual workspaces completely and seamlessly.



Strengths

Intelligent cloud migration continuum (iCMC™): The iCMC™ enterprise application modernization assessment provides a diagnostic solution that enables clients to build business cases and make informed decisions on the choice of cloud and the sequencing of applications to target for cloud migration and modernization. The platform represents the Machine First™ approach taken by the organization from larger cloud portfolio perspective. This enhances the speed-to-market and delivery certainty in cloud migration and core transformation engagements with customers.

Cloud-native first strategy: TCS' cloud portfolio includes an end-to-end service that involves articulating its cloud strategy and advisory, including platform-related services, roadmap definition discovery and assessment, deployment and implementation, workload migration, and hybrid managed services spanning public, private and hybrid cloud environments. This strategy enables its clients to accelerate cloud-native initiatives.

Cloud Counsel: The Cloud Counsel assessment process builds a business-centric view of the cloud footprint along with considering process-readiness, compliance and security considerations. This assessment model provides a comparative assessment of operating models and costs alongside different pricing models and platforms, ensuring optimal total cost of ownership (TCO).



Caution

TCS should bring in a transparent go-to-market model for its clients. Enterprises may not prefer end-to-end solutions from providers and may instead be looking for more modular options.



2020 ISG Provider Lens™ Leader

TCS executes large transformation deals in which clients benefit from its combination of business and technology excellence.

WIPRO



Overview

Wipro provides a business-first and design-led strategy that enables multi-cloud, private, and public clouds and delivers any application, on any device, on any cloud. The firm has signed a definitive agreement to acquire 4C, one of the largest Salesforce partners in the U.K. and Europe. Wipro has launched its innovation and talent hub in Reading, reinforcing its commitment to develop talent and strengthen science, technology, engineering and math (STEM) skills in the U.K. market.



Strengths

Significant investments in cloud business: Wipro has adopted a business-first approach through business acceleration, customer experience and connected insights. The core to each pillar is its “big bets” program, wherein the firm is investing heavily to accelerate growth in digital, cloud, engineering services and cybersecurity.

Enterprise consulting-led public cloud transformation: Wipro’s U.K. revenue for consulting has grown substantially over the previous year. Its differentiated cloud solution includes a cloud assessment that leverages cloud bots, cloud migration through cloud studios, prebuilt cloud-native application blueprints for development, integration and insights, and ongoing operations supported by its Enterprise Digital Operation Center (EDOC).

Extreme automation: Wipro offers significant automation capabilities to its clients by leveraging its intellectual property, framework and “boundaryless” data-center services.



Caution

The firm has a headroom to increase its multi-cloud transformation and migration clients in the region. Also, the firm should expand its local niche talent availability.



2020 ISG Provider Lens™ Leader

Wipro has the strategic ability to execute large public cloud transformation engagements. Its co-innovation lab center, the Wipro-AWS Launch Pad, helps clients accelerate their cloud journeys.

RISING STAR: DXC



Overview

DXC Technology is a global IT service provider headquartered in Virginia. In FY 2019, the company's overall revenue stood at \$20.7 billion, and its public cloud transformation revenue was more than \$800 million globally. It operates in over 65 countries and has more than 6,000 employees certified in popular public cloud platforms. DXC has over 80 clients globally for its consulting and integration practice. DXC is an AWS Premier Consulting Partner and a Microsoft Azure Gold Partner. The firm was also a Rising Star in the U.K. Public Cloud Transformation quadrant in 2018.



Strengths

Branding approach: DXC's public cloud services rapidly enable clients to accelerate their move to multi-cloud environments with industry-leading tools and Agile best practices to migrate and modernize applications.

Strong migration track in the U.K.: DXC applies industry-leading tools and practices to migrate more than 60,000 IT workloads and 2,600 applications every year. The firm also writes 2 billion lines of code for applications that support critical business processes. That has enabled DXC to grow its public cloud transformation portfolio by 12 percent in the U.K.

Strategic partnership with Google Cloud: Through this strategic partnership, DXC is launching a GCP center of excellence and a Google Cloud AI center of excellence to provide clients in key industries with secure, scalable and Agile cloud-based digital platforms that leverage advanced data analytics capabilities. The initial focus will be on joint solutions in industries such as insurance, oil and gas exploration, automotive, consumer products, retail, and banking and capital markets.



Caution

While DXC has carried out large transformation and migration engagements, the firm should focus on the run phase as well.

DXC should enhance its image among U.K. enterprises by hiring local talent for niche technologies.



2020 ISG Provider Lens™ Rising Star

DXC offers industry-centric solutions via portfolio and is committed to making continuous investments in the U.K. market.

The image features a dark blue background with a light blue horizontal band at the top. On the left side, there are several circular icons resembling camera apertures, arranged in a diagonal line from the bottom left towards the center. These icons are in various shades of blue and white. The word "Methodology" is written in a white, serif font on the right side of the image.

Methodology

METHODOLOGY

The research study “ISG Provider Lens™ 2020 – Public Cloud - Solutions & Services” analyzes the relevant software vendors/service providers in the U.K. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of Public Cloud - Solutions & Services market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and 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



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At ISG, Manoj Chandra Jha is primarily responsible for research projects and working on the ISG Provider Lens™ (IPL) program. He actively contributes to gathering service provider intelligence through both primary and secondary research. He is responsible for writing thought leadership reports and papers on briefings provided by the service providers. Manoj also writes blogs on trending topics, specifically on cutting-edge technology. He has executed several client requests for research and consulting assignments across industries, predominantly in \ IT, manufacturing and insurance. He has handled client communication for the team, managing the client right from onboarding to understanding their custom research requests to scheduling briefing calls. In addition, he has been closely involved with the quadrant studies around cloud services and the data center outsourcing market.



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ISG Provider Lens™ | Quadrant Report

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