ISG Provider Lens™

Public Cloud – Solutions & Services

Managed Public Cloud Services for Large Accounts

U.K. 2020

Quadrant Report

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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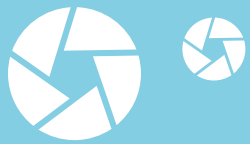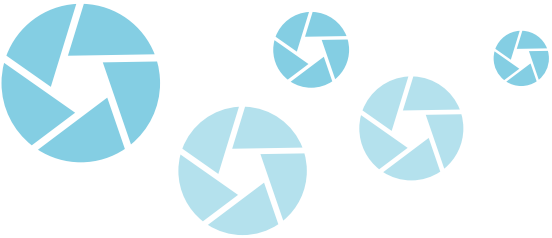
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EXECUTIVE SUMMARY

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.

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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 midsized 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

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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.

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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 for 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.

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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

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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

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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
Trasnputec	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

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Public Cloud - Solutions & Services Quadrants

ENTERPRISE CONTEXT

Managed Public Cloud Services for Large Accounts

This quadrant is relevant to large enterprises in the UK that are evaluating public cloud managed service providers (MSPs). In this quadrant report, ISG lays out the current market positioning of these providers in the UK and how they interact with key challenges in large enterprises' infrastructure management in the public cloud environment. These providers manage client workloads on third-party, public cloud, hyperscale environments so enterprises can focus on other tasks.

To be successful in the current digital business environment, enterprises must take a unified approach to their technical infrastructure across public and private clouds. Using public cloud managed services can help enterprises implement cloud-native solutions leveraging containers and serverless functions with single-touch DevOps integration. This helps enterprises achieve application modernization and cost optimization to run their applications at scale.

Enterprises will get the benefit of the MSPs' automation and AI capabilities to monitor their infrastructure to predict the failures and dependency of services in case of failures to reduce maintenance costs.

ISG sees that many enterprises in the UK are increasingly looking to modernize their workloads and migrate to the cloud. Enterprises will benefit from the service providers' expertise in managing workloads, integrated security and support functions. Besides infrastructure management, enterprises in the UK focus on financial management, cloud governance, brokerage and autonomous support functions.

IT leaders should read this report to better understand the relative strengths and weaknesses of managed service providers, as well as how the MSPs' approaches to the market can impact enterprise public cloud strategies, improve business agility and reduce total cost of ownership.

Software development and technology leaders should read this report to understand the positioning of managed service providers and learn how MSP offerings can impact ongoing development of an enterprise's software products.

Sourcing, procurement, and vendor management professionals should read this report to develop a better sense of the current landscape of managed services providers in the UK.

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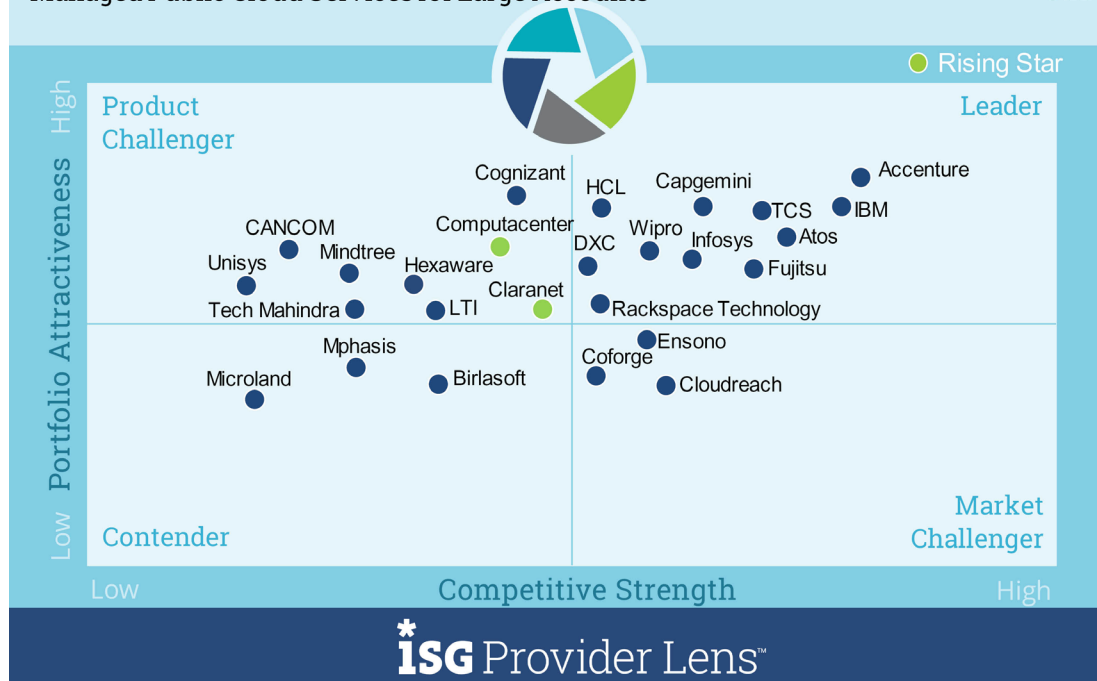# MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Definition

Public cloud managed services providers (MSPs) offer 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, with the aim of maximizing the performance of workloads in the cloud, reducing costs, and ensuring compliance and security. Typically, MSPs offer specially developed or licensed cloud management platforms and tools to serve customers with optimal automation and transparency about the managed cloud resource pool in terms of capacity utilization and costs, including self-service administration.

Public Cloud – Solutions and Services
Managed Public Cloud Services for Large Accounts

2020
U.K.

Rising Star

Product Challenger

Leader

Cognizant
HCL   Capgemini   Accenture
Computacenter   Wipro   TCS   IBM
CANCOM   DXC   Infosys   Atos
Unisys   Mindtree   Hexaware   Fujitsu
Tech Mahindra   LTI   Claranet
                    Rackspace Technology
Mphasis   Ensono
Microland   Birlasoft   Coforge   Cloudreach

Portfolio Attractiveness (High / Low)
Competitive Strength (Low / High)

Contender

Market Challenger

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Source: ISG Research 2020

MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Definition

Services provided typically include:

- Professional services for the management and monitoring of CPU, storage, memory, databases and operating systems as standalone or microservices or virtual machine and container services.

- Operation system, middleware, and application upgrades and patching services.

- Service portal for expense management (chargeback and showback) 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 and for cloud-native and legacy system integration.

- DevOps, API-enabled automation and cloud analytics experience.

- Mature security processes.

- Support for different client roles such as IT technicians and developers.

- Partnerships with relevant public cloud providers and managed service provider (MSP) certificates for AWS, Azure, GCP or others.

MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Observations

The global IT services industry has observed an increase in the adoption of public cloud managed services in the U.K. market. IT service providers and enterprises are executing consulting-led transformations and are offering support for cloud managed services across verticals. The steady increase in cloud adoption calls for skills in cutting-edge technologies, strong cloud management platforms and a joint possibility of innovating solutions in cloud-native models.

There has been an equal demand for all the cloud service providers, also depends on the enterprise strategic result outcome. While AWS services are being consumed as commodity services, Azure is used for building a more cloud-native, multi-tier application. Google Cloud is being implemented in the healthcare and retail verticals. IT service providers offer platinum, gold and silver models to cater to a certain set of services across cloud managed services. As the definition of cloud managed services is being more diversified, IT service providers are focused on areas such as DevOps, basic security and infrastructure as code (IaC) with out-of-the box API integration capability.

Because the cloud is an integral element of solution design, enterprises seek real-time analytics and zero-touch operations to avoid business process failure. This space will continue to evolve in the U.K. market with an increase in cloud adoption and IT spend. U.K. public cloud adoption is distant outside EU countries especially in the German region, the Nordics, the Benelux countries and Ireland. IT service providers in the U.K. have numerous public cloud certifications, a broad portfolio that encompasses productized services to quickly discover the client's system landscape, and infrastructure and application assessment workshops. In addition to strategy and implementation services, U.K.-based clients (particularly large corporations) typically seek public cloud managed services that involve automation techniques for monitoring and billing requests. This market demand exists because standard offerings from the public cloud providers are inadequate to meet large enterprise needs for technical business management and line-of-business cost transparency in correlation to consumption and business output.

Of the 49 companies included in this study, 26 have qualified for this quadrant. Eleven are Leaders and two are Rising Stars.

- **Accenture's** strategic partnerships, business groups and a large pool of certified staff have helped the firm gain better insights into managed services and develop DevOps. The firm has numerous certifications from public cloud providers that help U.K. enterprises in their digital transformation journey.

MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Observations (cont.)

- **Atos** has moved from being a recognized consulting player to offering better managed services by increasing its competencies from Azure and AWS.

- **Capgemini** is driving automation and pitching itself as a cloud-agnostic player to better cater to enterprises seeking a hybrid or multi-cloud setup.

- **DXC Technology** works with some of the U.K.'s largest enterprises and government agencies to help strengthen its regional presence and win large deals.

- **Fujitsu** has years of experience in serving the U.K. public sector space and has planned to gain SAP and other competencies for workload services.

- **HCL** has launched an innovation center in the U.K. to support the development of new services and is racking up competencies and certifications from IaaS vendors.

- **IBM** offers new operating models, working practices, and opportunities for paradigm-shattering innovation across cloud services.

- **Infosys** has developed robust assessment and monitoring platforms and has all the necessary top-tier certifications from public cloud vendors.

- **Rackspace** provides next-generation cloud managed services with its large pool of certified employees and an array of intelligent automated solutions.

- **TCS**' ignio™ platform, migration frameworks and workload automation have enabled it to deliver valuable services to U.K.-based enterprises.

- **Wipro** has made extensive investments in its cloud management platform and is focused on the right cloud approach with operational excellence to serve enterprises in the U.K.

- **Claranet** has deep roots in providing AI and ML services and more than 150 certified cloud architects and consultants. It also has a deep understanding of GCP and AWS to better serve the small and medium-sized business segment in the region.

- **Computacenter** is a part of the AWS Well-Architected Partner Program to drive architectural excellence. It has helped customers to realize significant annual savings on their public cloud consumption, thereby supporting overall cost optimization.

ACCENTURE

Overview

Accenture employs more than 11,000 employees in the U.K. across service lines in 26 offices. The firm provides cloud consulting, migration and integrated multi-cloud managed services in the market. The organization has broadened its overall portfolio in the region through a series of acquisitions in the niche technologies segment. It is an approved technology and consulting provider for the U.K. government under the G-Cloud procurement initiative.

Strengths

Aligned with enterprises security demand: Accenture has done multiple acquisitions in the security space to address the CIO, CTO and CISO demand to address phishing and other malicious attacks. Its latest acquisition of context information security in U.K. market has broadened its overall security portfolio and niche security expert strength.

Consultant and architect presence in the U.K. market: The organization has strategic business groups across AWS, GCP and Azure. Its certified employees in Europe work across private and public sector customers to craft their digital transformation journey.

Well-crafted cloud managed services: Accenture offers a range of cloud services that cover strategy consulting, transformation, cloud platform and managed services. The firm enables its clients with AI-led multi-cloud workload operation with cloud consumption economics.

Caution

Accenture is a premium service provider and has a history of working mostly with large-scale enterprise clients. However, the firm should build a lightweight portfolio to cater to medium-sized clients.

2020 ISG Provider Lens™ Leader

Accenture's robust partnerships and global business groups with public cloud providers, which lead to co-innovation of advanced solutions, make it a prominent public cloud managed service provider for enterprise clients.

ATOS

Overview

Atos provides multi-cloud, multi-year cloud managed services with its cloud platform and niche local talent availability in the U.K. market. Atos had acquired KPMG Consulting in the U.K. and the Netherlands. The firm has a substantial presence in the region with deep domain capabilities.

Caution

Atos should focus on onboarding clients across verticals to increase its market share. The organization should also focus on a recurring revenue model.

Strengths

London-based digital innovation center: Atos has opened a digital innovation center in London, in partnership with Google Cloud, to help accelerate enterprises' AI adoption journey. The innovation center provides private and public sector organizations from across Europe with access to AI experts. This enables stakeholders to collaborate and create new use cases for the technology, including industry-specific applications.

Hyperscalers' MSP accreditations: Atos has been certified as an Azure Expert Managed Services Provider in 2019. It is an AWS Advanced Consulting Partner, authorized commercial reseller and managed service provider, and it has a close relationship with ServiceNow for cloud orchestration. This has positioned the firm well for enterprise IT service management structures. And its recent accreditation as a Google Cloud MSP has broadened its overall managed services portfolio.

Tailored managed services portfolio: Atos' deeper capabilities with traditional and cloud-native enable it to support multi-cloud managed services. It also provides lift-and-shift transitions, application refactoring and application reimplementation as cloud-native applications across cloud service providers.

2020 ISG Provider Lens™ Leader

With its strong portfolio of multi-cloud managed services, Atos can deliver integrated automation and single-pane-of-glass solution to enterprise clients.

ISG Provider Lens™

CAPGEMINI

Overview

Capgemini provides cloud consulting, large complex migration and multi-cloud managed services in the U.K. market, where it earns over $35 million in annual revenue from public cloud services. The organization and its 2,500 employees serving U.K. enterprise clients across verticals have decades of experience and strong domain and niche technology expertise. The organization has achieved audited MSP competency from AWS and Microsoft Azure.

Strengths

Integrated and AI-led cloud management platform: The Capgemini Cloud Platform (CCP) for multi-cloud management provides enterprises with a portfolio of cloud operation services along with the needed flexibility of working with the right cloud environment (private and public cloud). Along with the standard features of a cloud management platform, CCP has a complete toolset for cloud-native development, API management and integration, DevOps, iPaaS and container management.

Automation-driven program: To improve its operational excellence, Capgemini has come up with a unique program for automating tasks. It has been successful in reducing mean time to response (MTTR) by 50 percent through self-healing, and it has resolved 35 percent of incidents through auto-healing. This has resulted in less downtime for clients and improved productivity, along with reducing the number of errors. The company has also implemented low-touch and zero-touch solutions.

Cloud center of excellence: Capgemini has a cloud center of excellence that help clients get the maximum value of the cloud. It focuses on regional presence along with verticals. The center of excellence offers a combination of skills focused on pre-sales, solution architecture on infrastructure, solution architecture on applications and partners.

Caution

Capgemini should focus on achieving competencies around GCP and on building deeper vertical-centric solutions for U.K. enterprises.

2020 ISG Provider Lens™ Leader

Despite the declining economic conditions in the U.K. due to the COVID-19 pandemic and Brexit, Capgemini has registered significant business growth across verticals, specifically in the public sector.

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DXC TECHNOLOGY

Overview

DXC provides hybrid cloud transitions and delivers multi-cloud managed services that integrate mainframe, midrange, private cloud and public cloud. It has 25 delivery centers in U.K. and Ireland with a large client base across the public and private sector. The organization has established an innovation and digital transformation center in London to accelerate its clients' digital transformation journey.

Caution

DXC should focus on increasing its client base across verticals in the U.K. market in the private sector. The organization should also increase its local niche talent availability in the market in coming quarters.

Strengths

London innovation and digital transformation center: DXC's London innovation center offers a digital design approach for delivering transformative solutions. Also, the organization has specific verticalized solutions on industries such as government, energy and utilities, healthcare and life sciences, travel and transportation, insurance, financial services, and manufacturing.

Integrated multi-cloud management platform: The DXC Agility Platform is an enterprise-integrated, AI-led solution that provides a single, consolidated cloud management solution to help large companies simplify the complexities of public, private and hybrid cloud management.

Resilient cloud managed services: DXC managed multi-cloud services powered by VMware accelerate the deployment of a complete managed virtual environment. Its cloud managed services offering provides secure private and public clouds to help organizations reduce IT operating costs, deploy applications faster, and shorten time-to-market for new products and services. The overall approach ensures the clients' IT resilience.

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DXC delivers managed services through its strong Azure partnership and by leveraging its proprietary Bionix™ platform, which is an integral part of next-generation operations and cloud journey. The firm's launch, adopt and run framework along with its strong platform ecosystem offer a vast range of multi-cloud managed services.

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FUJITSU

Overview

Fujitsu's "Your Multi-Cloud" approach for multi-cloud and hybrid services enables customers to transform their infrastructure, applications and services. It has 9,000 employees in the U.K. and Ireland who provide services to customers across verticals. Fujitsu offers product and solution co-creation with digital technology and creates new value with ecosystem partners and customers. It has customers in both the public and private sectors, including retail, financial services, transport, manufacturing, government and defense.

Strengths

Threat response service in the U.K.: The organization has launched threat responsive services in the U.K. market to ensure that each client has access to cybersecurity expertise in crafting right security ecosystem. Because cyberattacks have increased over the last eight quarters as cloud adoption and digital transformation have risen in the U.K. market, Fujitsu's threat response services are seeing good acceptance across verticals.

Range of expertise and edge position: Enterprises can rely on Fujitsu's experience from the ongoing management of more than 5,000 large-scale hybrid IT projects on more than 30 cloud platforms, including AWS and Azure. Fujitsu is a key supplier for the U.K. public sector and is a strategic integrator of VMware Cloud on AWS.

Cloud managed services: Fujitsu has achieved accreditation as an AWS managed service partner. Also, the organization has robust and range of multi-cloud managed services portfolio. Its RunMyProcess DigitalSuite platform, which has received technology partner recognition from hyperscalers, helps clients scale applications independently in an Agile approach.

Caution

Fujitsu needs to train and certify more locally available public cloud experts to be able to scale and compete with other leaders in this market. Also, Fujitsu should focus on increasing it Google Cloud competency and managed service partnership.

2020 ISG Provider Lens™ Leader

Fujitsu has deep cloud services portfolio, domain experience and niche local talent availability in the region. Also, the firm has robust cloud management platform which enables clients to manage multi-cloud workload.

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HCL

Overview

HCL Technologies provides consulting, migration, transformation and multi-cloud managed services in the U.K. market. The firm has witnessed 49 percent growth in cloud services. It has large employees base serving U.K. clients in remote and onshore models. In the recent past, HCL has launched its cloud center of excellence and FinTech innovation lab in the U.K. market to accelerate clients' cloud and digital transformation journey.

Strengths

Cloud-native and FinTech lab in London: Through its cloud center of excellence, the firm offers cloud transformation services and engineering expertise across verticals to drive the digital innovation of U.K. enterprises.

Hyperscalers and CNCF-certified service provider: HCL has achieved major competency accreditation across large hyperscalers. Also, the firm has become the first Indian global system integrators to achieve gold member accreditation from the Cloud Native Computing Foundation (CNCF), which strengthens its large Kubernetes stack of managed and transformation services.

Cloud managed services: HCL's ElasticOps is an AI-driven cloud operations and managed services offering powered by DRYiCE™ technology. This enables clients to allow for the dynamic and endless scaling of IT services to manage public cloud consumption. The firm also offers infrastructure as code by using Ansible, Terraform and AWS Config for infrastructure provisioning, orchestration and deployment in public cloud managed operations.

Caution

HCL should focus on increasing its public sector, travel and transportation clients in the U.K. market. It should also focus on existing new and net-new client segment growth in digital transformation.

2020 ISG Provider Lens™ Leader

HCL has grown significantly in terms of scale, revenue and client size over the previous year. With its DRYiCE™ framework and strategic partnership with top hyperscalers, the firm has been successful in getting large public cloud deals.

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IBM

Overview

IBM is a large global service provider that has a significant presence across the U.K., where it employs over 20,000 employees across business segments. It has a cumulative revenue of over $24 billion in the Europe, Middle East and Africa region. IBM's public cloud transformation services are centered on the AI-powered IBM Watson and its own set of tools and services. The firm acquired Red Hat in 2018 to improve its hybrid cloud services and public cloud capabilities within the IBM Cloud offering.

Strengths

Advisory and consulting expertise: IBM provides cloud transformation services for enterprises on the best migration approach from any environment to the cloud through integrating, managing, and optimizing across AWS, Microsoft Azure, IBM Cloud™ and other cloud providers. It uses a secure framework to accelerate the migration journey. The firm also provides multiple levels of orchestration, monitoring, security and automation along with seamless performance in public or private clouds.

Security and compliance standards: IBM's cloud transformation framework meets the highest standards of security and compliance. The company has strong expertise to build secure, multi-cloud environments for both traditional and cloud-native applications including backup and disaster recovery services. It drives cloud-agnostic security that provides a single pane of glass across on-premises and multi-cloud environments, including IBM Cloud, AWS, Azure and VMware SaaS. IBM z15™ transforms customer application and data portfolio with innovative data privacy, security and cyber-resilience capabilities.

End-to-end transformation: IBM multi-cloud infrastructure development services creates an end-to-end comprehensive strategy, architecture, design, transformation roadmap and standardized delivery building blocks by integrating tools to support DevOps and containerized workloads. IBM Garage™ methodology is an AI- and automation-based approach to accelerating the modernization journey. The IBM Cloud Pak™ for Multicloud Management, running on the Red Hat® OpenShift® Container Platform, provides consistent visibility, governance and automation from on-premises to the edge.

Caution

IBM can increase its customer base in the U.K. with both large and midmarket customers by shifting its focus from large transformational deals to work on better pricing options for a wide range of customers.

2020 ISG Provider Lens™ Leader

IBM provides cloud consulting and transformation services for large-scale clients to help their digital transformation journey through its complex integration capabilities.

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INFOSYS

Overview

Infosys provides consulting, technology, outsourcing and next-generation digital services in the U.K. region. The organization has matured services around cloud strategy, platform engineering, migration services and cloud-native deployment. With its recent launch of Cobalt, it helps organizations rapidly develop the business solutions to innovate for the future. Such capabilities are a critical part of growing business resilience through digital transformation. The organization has achieved recognition as the Azure Partner of the Year for the U.K. market and has developed multiple vertical solutions that are running on hyperscalers.

Strengths

Multi-cloud orchestration and management: Infosys provides cloud-agnostic management and monitors multi-cloud workload through its intuitive and cognitive cloud management platform. The platform offers a dynamic decision support framework, smart brokerage, governance and observability thought its autonomous digital IT approach.

Numerous hyperscaler certifications: The company is certified for all the major public cloud providers at high partnership levels. Its certifications include AWS Premier Consulting Partner along with a migration acceleration competency, Azure Gold Partner, IBM Gold Partner, Oracle Diamond Elite and Google Global Systems Integrator.

Cobalt lab: Infosys Cobalt serves clients with its catalogue of over 200 pre-built, cloud-first solution blueprints. The combination of Cobalt and Infosys global digital centers enables clients to co-create new solutions and accelerate speed-to-market. The platform also provides regulatory and security compliance, and technical and financial governance come baked into every solution delivered.

Caution

Infosys should focus on onboarding net new clients across private and public sectors and on increasing its local niche talent availability in the U.K. region.

2020 ISG Provider Lens™ Leader

Infosys multi-cloud managed services practice ensures seamless functioning of cloud workloads and hosted business-critical applications. The firm has AI-driven self-healing processes and automation tools that meet the technical requirements of enterprise workloads.

RACKSPACE TECHNOLOGY

Overview

Rackspace, which has been rebranded as Rackspace Technology, has transformed and diversified its multi-cloud services portfolio. It has more than 1,100 employees serving clients across the Europe, Middle East and Africa region. The organization successfully achieved hyperscaler accreditation with a large number of industry competencies.

Strengths

Fanatical Experience™: The organization has shown an absolute focus in customer's experience with its well-mapped, multi-cloud service portfolio. It's when and how model with integrated tools stack delivers the best services to its clients proactively.

Fabric-led management platform: The organization has built a fabric technology platform that provides integrated multi-cloud management and monitoring services. The fabric platform can provide risk and governance, smart analytics, chargeback and showback throughout the client's multi-cloud estate. Rackspace fabric enables clients to realize full transformation capabilities.

Cloud architects and consultants: Rackspace technology has large pool of niche hyperscalers trained and certified employees in the region. Also, it has cloud-native resources working in conjunction with cloud consultants, which provides the best-of-breed architecture to enterprise clients across the verticals.

Caution

Rackspace should focus on increasing its clientele in the region though organic and inorganic models.

2020 ISG Provider Lens™ Leader

Rackspace Technology is emerging as a niche, multi-cloud managed service provider. Its customer experience offering is based on an excellent support system called Fanatical Experience.

TCS

Overview

TCS's proposition in the U.K. market, based on cloud, Agile and machine-first solutions, has been resonating with clients in the U.K. market. The organization has a wide spectrum of cloud services with predefined blueprints and various vertical solutions. The firm has a substantial number of niche and cloud-certified talent available in the region. The organization has approximately 15 offices in U.K.

Strengths

Comprehensive platform ecosystem: TCS's comprehensive Cloud Exponence platform delivers smart managed services in hybrid cloud environments. The platform is backed by its Machine First™ approach, which reduces cloud management overheads and provides a seamless service autonomous IT experience.

Reliability & Performance: Cloud Exponence is designed to ensure availability and fastest resilience to failures that may occur on any cloud resource. It leverages design architectures such as serverless and PaaS to reduce operational burden and focuses on the efficient use of computing resources to maintain clients' efficiency.

Investment in training and certification: TCS has been investing substantially to train and certify a large number of resources in various cloud capabilities, which reflects the organization's commitment to its prospective and existing clients in the region.

Caution

TCS should focus on increasing its client strength in the U.K. public sector and on bringing modularity into its cloud services.

2020 ISG Provider Lens™ Leader

TCS has transformed its overall cloud managed services portfolio, which has increased the overall customer satisfaction rate in the region. In addition, it has increased its niche local talent availability with its continuous investment in training.

WIPRO

Overview

Wipro provides cloud assessment leveraging various cloud platforms and accelerators for cloud migration through Cloud Studios. The firm offers prebuilt, cloud-native application blueprints for development, integration and insights, and ongoing operations supported by its Enterprise Digital Operation Center (EDOC). It has about 600 hyperscaler-certified employees serving across verticals in the region. Its U.K. cloud revenue has grown by 60 percent over the last year.

Strengths

Cloud-native-focused business in the U.K.: Wipro is a cloud-native-focused service provider with an ability to provide a cutting-edge cloud ecosystem, DevOps and cloud managed services. It has a "business-first" strategy with DevOps support for cloud-native app development.

Integrated multi-cloud managed services: Wipro was one of the early entrants in multi-cloud managed services. Over the last few years, its cloud management platform has added multiple features. In addition, its enterprise digital operation is integrated with HOLMES AIOps capabilities. The overall capabilities enable clients with cost optimization, auto-scaling, infrastructure as code and many other features.

Brokerage of cloud service: Wipro's "boundaryless" platform provides cloud service brokerage that aggregates, integrates and customizes services across public or private clouds. The firm's digital operation center offers modular services to enterprises to navigate, consume, extend and maintain cloud services.

Caution

Wipro should focus on increasing its public sector client base in the U.K. market and on becoming a member of the U.K government's G-Cloud 4 and digital services framework.

2020 ISG Provider Lens™ Leader

Wipro has transformed its cloud strategy with its dedicated practices across large hyperscalers. It has also shown growth in its overall U.K. cloud business revenue.

RISING STAR: CLARANET

Overview

Claranet provides cloud consulting, assessment, migration, transformation and multi-cloud managed services in the region. The firm has proven experience in migrating thousands of applications to the cloud. Claranet has approximately 400 clients and more than 150 certified cloud architects and consultants serving clients across verticals in the region.

Strengths

Cloud management platform: Claranet's cloud management platform is a combination of its own intellectual property and white-labeled, third-party tools. Claranet Online was developed in-house and used alongside CloudHealth to provide visibility across the entire cloud ecosystem to optimize resources and define governance policies for ongoing management.

Cloud managed service: The organization helps its clients make the most of the innovation potential offered by AWS, Google Cloud and Microsoft Azure and assumes responsibility for the development, design, operation and continuous development of customer environments. Claranet follows a complete DevOps concept with innovative solutions including containers and Kubernetes and offers managed cloud-native applications with a high degree of flexibility for the customer.

Caution

Claranet should focus on branding its various platform and accelerators to get the maximum visibility in the region. Also, there is headroom for Claranet to increase its market stake in large account managed services across verticals.

2020 ISG Provider Lens™ Rising Star

Claranet is emerging as a niche transformation, migration and cloud managed service provider. The firm has strengthened its overall positioning in the region.

ISG Provider Lens™

RISING STAR: COMPUTACENTER

Overview

Computacenter provides cloud consulting and strategy, implements the most appropriate technology, and manages its client's multi-cloud IT landscape. The organization has 10 offices in the U.K. and is headquartered in Hatfield. In the recent past, Computacenter has broadened its accreditations with AWS and Microsoft Azure, which helps enterprise clients to optimize and manage cloud workloads in a seamless fashion.

Strengths

Transformed cloud managed services offering: Computacenter's public cloud services provide end-to-end professional and managed services for private and public sector enterprise clients. The organization has recrafted its overall cloud strategy with hyperscalers and has robust domain experience.

Infrastructure as code (IaC): Computacenter leverages Terraform as the standard IaC tool for tenancy, network, security and virtual instance deployment. The organization provides out-of-the-box reference architectures for customer landing zones, which are used as the foundation. Computacenter also offers custom IaC solutions based on business needs.

Caution

Computacenter should focus on gaining top managed services partner credentials from Azure and GCP.

2020 ISG Provider Lens™ Rising Star

Computacenter is emerging as a niche cloud managed services provider in the region across the public and private sectors.

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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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